

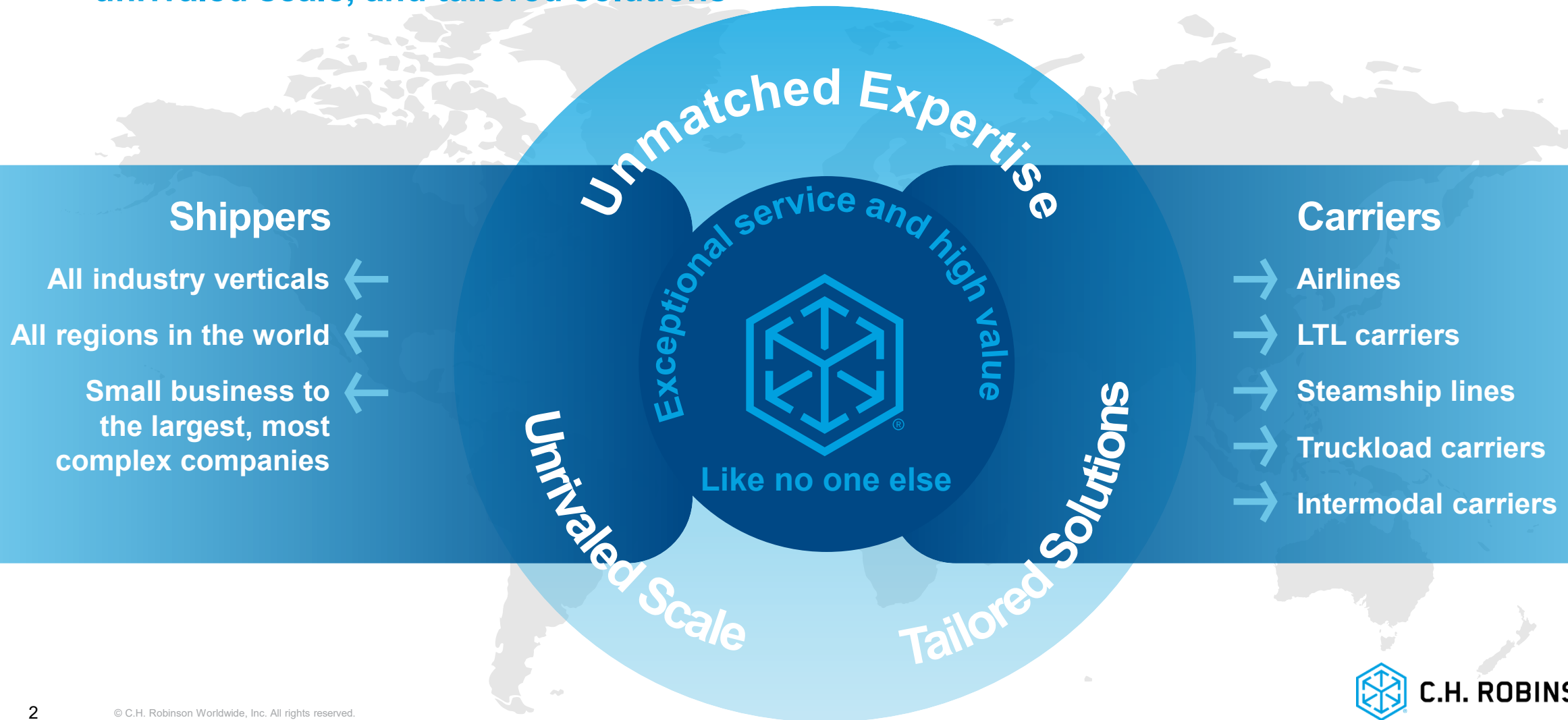
OCTOBER 2026 REPORT

C.H. Robinson
Edge™

→ Simplifying logistics—across the world

Overview

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



→ Freight Market Update

- 1 Key Takeaways
- 2 Truckload
- 3 LTL Shipping
- 4 Ocean Freight
- 5 Air Freight
- 6 Trade Policy



→ Key Takeaways

High-level insights at a glance

- **Truckload U.S. spot market cost/mile forecasts**
 - **Dry Van:** +30% year-over-year (y/y) growth for 2026, +10% for 2027 y/y
 - **Temperature Controlled:** +31% y/y growth for 2026, +11% for 2027 y/y
 - **Flatbed:** +28% for 2026 y/y growth, +10% for 2027 y/y
- **LTL Truckload tightening** continues to shift freight back into LTL networks, supporting gradual volume growth and firmer market conditions.
- **Ocean freight:** October conditions will vary by trade lane. Post-Golden Week Trans-Pacific sailings, port congestion, Colombo transshipment disruption, and selective Suez service returns will determine how much scheduled capacity is actually usable.
- **Air freight:** The main pressure point shifts to mid-October, when factories reopen after Golden Week. Technology demand, freighter deployment, and cargo profile could tighten specific Asia departures before the broader market shows a capacity shortage.
- **Tariff actions, sanctions enforcement, and intensified customs scrutiny** continue to increase supply-chain complexity and compliance requirements.



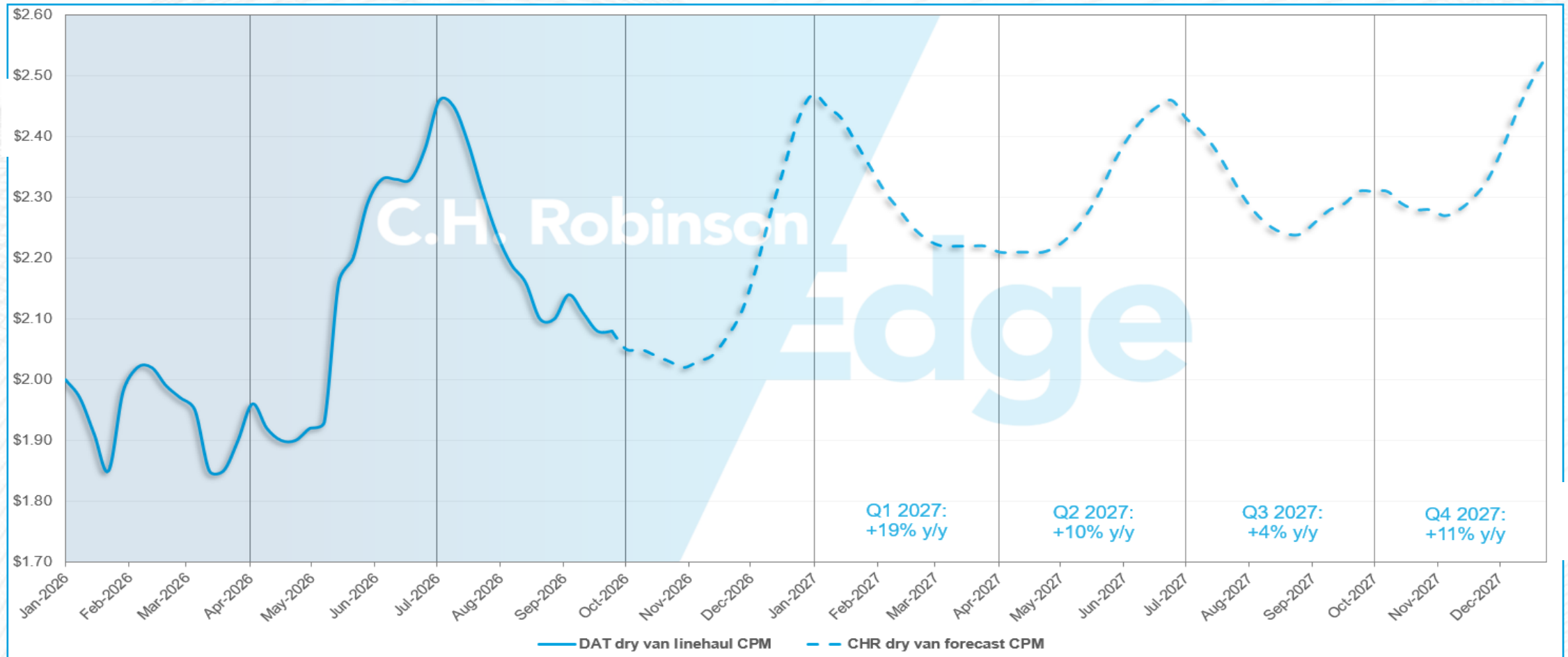
C.H. ROBINSON

Truckload

→ U.S. Spot Market Forecast | Dry Van

Truckload

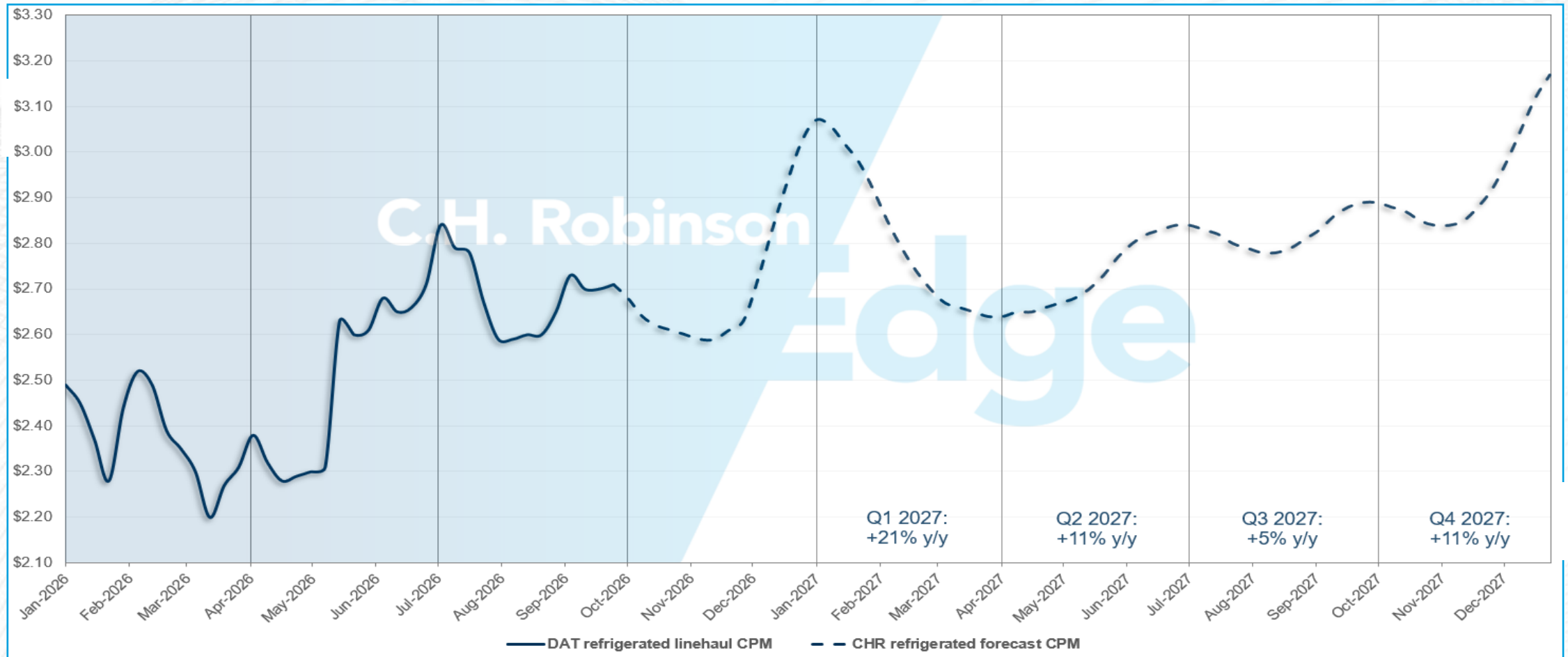
2026 +30% linehaul cost/mile increase y/y, 2027 +10%



→ U.S. Spot Market Forecast | Temperature Controlled

Truckload

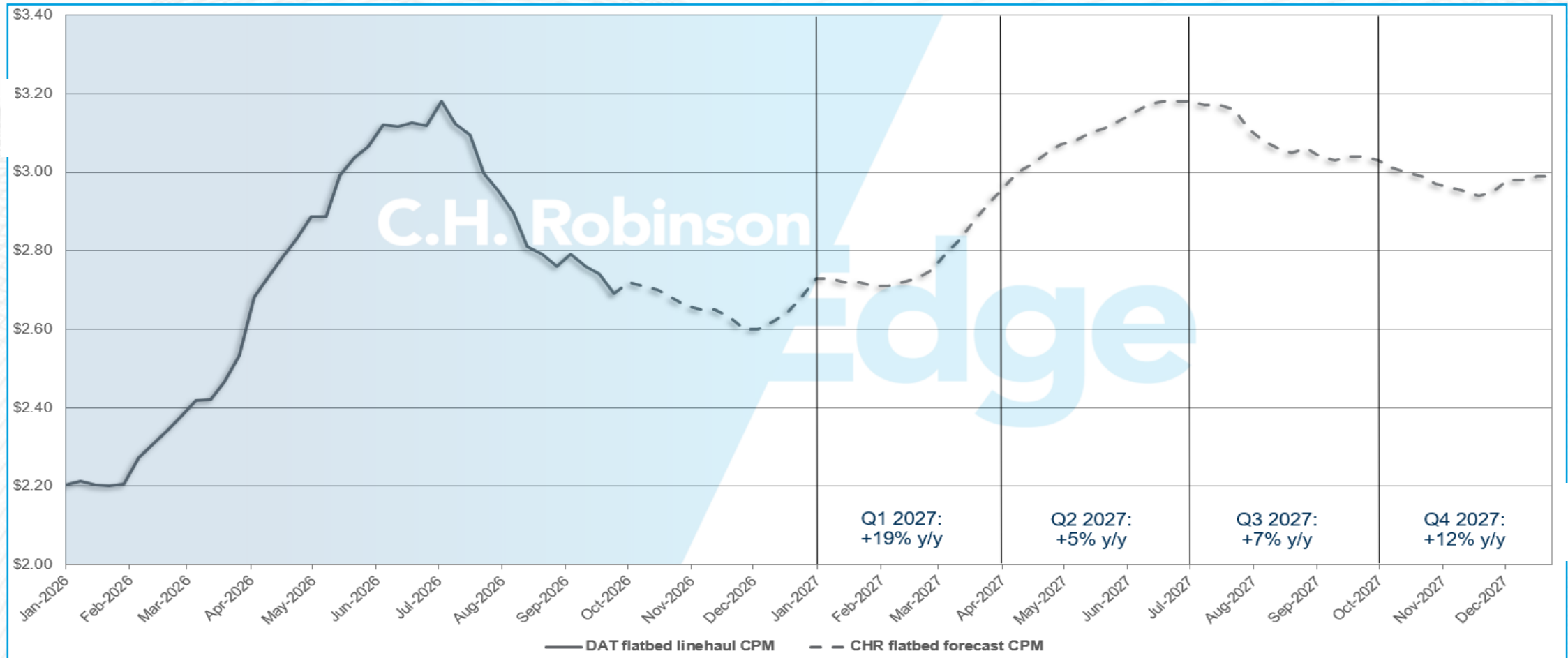
2026 +31% linehaul cost/mile increase y/y, 2027 +11%



→ U.S. Spot Market Forecast | Flatbed

Truckload

2026 +28% linehaul cost/mile increase y/y, 2027 +10%





C.H. ROBINSON

LTL Shipping

→ U.S. Less-Than-Truckload

LTL

service levels normalize as networks become more fully utilized

- **Carrier networks** continue absorbing freight that is shifting back from truckload, supporting modest tonnage growth and higher utilization.
- **Service performance** remains generally reliable, though transit-time variability is returning toward more typical LTL operating levels as network density increases.
- **Transit times** remain competitive, but localized delays are more common as carriers manage higher shipment volumes and tighter network capacity.
- **Market dynamics** continue to strengthen gradually, with carrier pricing discipline and fuel surcharges contributing to a firmer rate environment heading into Q4.





C.H. ROBINSON

Ocean Freight

→ Ocean Freight

Ocean

Service execution will determine how much capacity is usable

- **The main pressure point shifts to post-Golden Week sailings:** Planned blank sailings will reduce effective Trans-Pacific capacity through roughly mid-October. The first post-holiday departures will show whether returning demand and existing backlogs keep preferred sailings tight.
- **Port congestion is reducing usable capacity:** Roughly 12% of vessel capacity is tied up by congestion. Vessel bunching, port omissions, and transshipment delays are making published capacity less representative of what shippers can actually use.
- **Asia–Europe is moving in a softer direction:** Vessel supply remains ample and selected services are returning through Suez. Rates are easing, although North European congestion continues to create schedule variability and missed-connection risk.
- **India–North America remains one of the tighter markets:** Reduced vessel capacity, Colombo feeder disruption, and equipment constraints continue to limit booking flexibility, particularly into the U.S. East and Gulf Coasts.
- **Canal and routing risk could still disrupt schedules:** The planned October 1 Panama draft reduction was cancelled, but transit availability, missed reservation windows, and service-specific Suez changes can still alter routing and timing.
- **Planning implication:** Review the full routing before booking. Confirm port rotation, transshipment exposure, equipment availability, cargo acceptance, and a practical recovery option if the intended sailing or connection changes.





C.H. ROBINSON

Air Freight

→ Air Freight

Air

Post-Golden Week demand will test select Asia departures

- **The main pressure point shifts to mid-October:** China's Golden Week creates an early-month lull, followed by a stronger rebound as factories reopen. Technology, new-product, and time-sensitive cargo could tighten preferred departures first.
- **Freighter deployment may shift capacity between markets:** Strong U.S.-bound demand can pull aircraft and allocations toward Trans-Pacific services, reducing workable options from other Asia origins even without a broad increase in demand.
- **Cargo profile will matter more than regional averages:** Standard freight may still find space in passenger belly capacity, while oversized, dense, temperature-controlled, and other main-deck-dependent cargo face fewer alternatives.
- **Asia–Europe remains more selective than broadly tight:** Technology and industrial demand are building, but ecommerce remains softer. Conditions will vary by origin, aircraft type, and available departure options.
- **Disruption could tighten the market quickly:** Typhoon activity or selective ocean-to-air conversion could push urgent freight onto already-busy Asia departures and extend pressure beyond the initial post-holiday rebound.
- **Planning implication:** Watch the second and third weeks of October closely. Confirm main-deck requirements, preferred departures, airline cutoffs, and alternate gateways before flexibility begins to narrow.





C.H. ROBINSON

Trade Policy & Customs

→ Navigating Government & Trade Impacts

Policy uncertainty remains elevated and the regulatory environment gets stricter

- **U.S.–Canada tariffs:** New U.S. and Canadian tariffs are increasing cross-border uncertainty, though the affected products represent a relatively small share of overall North American trade.
- **Customs & Brokers:** CBP maintained duty interest rates for Q4 2026 and reminded licensed customs brokers to complete required continuing-education credits before the January 31, 2027 deadline.
- **Canada Importing:** Customs scrutiny of routing and origin claims is increasing.
- **Diesel Export Ban?:** CBSA released a new importer guide outlining key requirements for declaring goods, determining origin, and managing duties when importing into Canada.
- **Infrastructure Funding:** Congress extended federal transportation programs through December 11, avoiding an immediate funding lapse while negotiations continue on the longer-term BUILD America 250 Act.
- 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

