

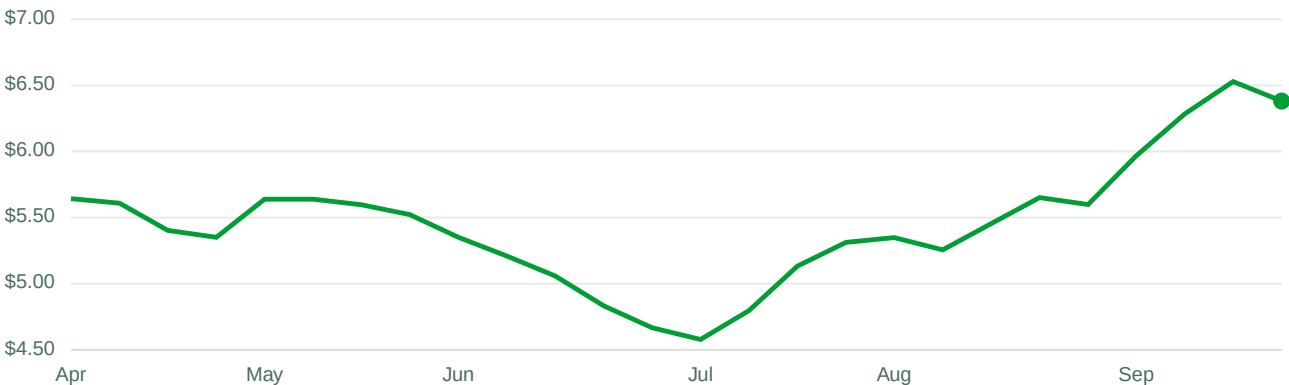
US FREIGHT MARKET REPORT

September 2026

Diesel prices rose sharply and truckload producer prices climbed in September 2026, while freight volumes sent mixed signals. The U.S. Energy Information Administration reported on-highway diesel averaged \$6.29 a gallon for September, up 83 cents from August's \$5.46. The Bureau of Labor Statistics' producer price index for long-distance truckload trucking rose 4.6% to 219.4, a preliminary figure that may be revised. The Bureau of Transportation Statistics' Freight Transportation Services Index slipped 0.4% in August to 134.4.

On-highway diesel, US average, weekly

Dollars per gallon. Source: U.S. Energy Information Administration.



On-highway diesel, US average

\$6.29 +\$0.83 vs Aug

Per gallon, September 2026 average of weekly prices. U.S. Energy Information Administration.

Truckload producer prices

+4.6% vs Aug

Long-distance truckload, September 2026, the latest month published. U.S. Bureau of Labor Statistics.

Freight services index

134.4 -0.4% vs Jul

Output of for-hire freight transportation, August 2026, the latest month published. U.S. Bureau of Transportation Statistics.

Cass Freight Index (shipments)

+1.9% y/y

September 2026 year-over-year change in Cass Freight Index shipments tracked by Cass Information Systems.

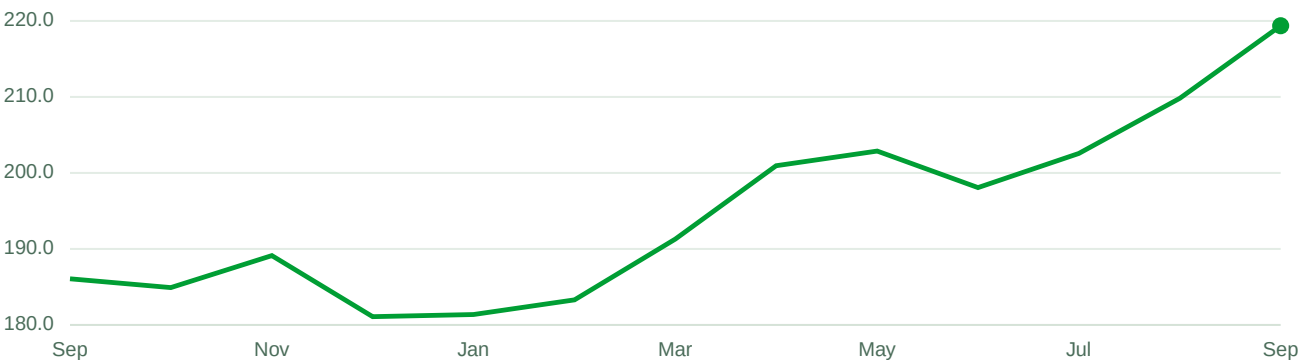
Key findings

- 01 On-highway diesel averaged \$6.29 a gallon in September 2026, up 83 cents from August's \$5.46, according to the U.S. Energy Information Administration [1].
- 02 The BLS producer price index for long-distance truckload trucking rose 4.6% to 219.4 in September, a preliminary reading subject to revision [2].
- 03 DAT's Truckload Volume Index showed dry van volume at 252 in September, down 1% from August and down 1% year over year, while reefer volume fell to 178, down 5% from August and down 10% year over year [5].
- 04 The Cass Freight Index for shipments rose 1.9% year over year in September, the second straight annual increase after a 3.5-year downturn, while the Cass Freight Index for expenditures rose 20.4% year over year [4].
- 05 ATA's advanced seasonally adjusted For-Hire Truck Tonnage Index fell 0.5% in August after falling 1.2% in July [6].

1. Truckload: rates, capacity and fuel

On-highway diesel averaged \$6.29 a gallon in September 2026, up 83 cents from August's \$5.46, according to the U.S. Energy Information Administration [1]. In its October 2026 Short-Term Energy Outlook, the EIA forecast that retail diesel prices would stay above \$6 a gallon in October before gradually declining to an average of about \$4.50 a gallon in 2027 [7].

Producer prices, long-distance truckload
Index, monthly. Source: U.S. Bureau of Labor Statistics.



The BLS producer price index for general freight trucking, long-distance truckload, rose 4.6% to 219.4 in September from 209.8 in August, a preliminary figure that may be revised [2]. The Bureau of Transportation Statistics' Freight Transportation Services Index fell 0.4% to 134.4 in August, from 134.9 in July [3].

DAT Freight & Analytics reported its Truckload Volume Index for dry van at 252 in September, down 1% from August and down 1% year over year [5]. DAT's reefer volume index fell to 178, down 5% from August and down 10% year over year [5]. DAT also estimated the average fuel surcharge portion of dry van rates reached a record 84 cents a mile in September [5].

Cass Information Systems reported its Cass Freight Index for shipments at 1.062, up 1.9% year over year in September, the second straight annual increase after a 3.5-year downturn [4]. The Cass Freight Index for expenditures rose 20.4% year over year [4], and the Cass Truckload Linehaul Index rose 10.1% year over year [4].

The American Trucking Associations' advanced seasonally adjusted For-Hire Truck Tonnage Index fell 0.5% in August after falling 1.2% in July [6]. ATA's not seasonally adjusted tonnage index was 116.1 in August [6].

2. Policy and regulation

The Federal Motor Carrier Safety Administration published a final rule in the Federal Register on September 1, 2026, raising annual Unified Carrier Registration fees for motor carriers, brokers, freight forwarders and leasing companies, with an effective date of October 1, 2026 [8]. The fee increase is scheduled to average 20 percent, starting with the 2027 registration year [8].

Under the rule, fee increases are scheduled to range from \$9 to \$9,329 per entity depending on the applicable fee bracket, with the smallest increase applying to the smallest motor carriers and small brokers and the largest applying to entities in higher fee brackets [8].

3. Equipment and industry

ACT Research reported preliminary North America Class 8 net orders of 18,700 units in September 2026, down 9.5% year over year [9]. Preliminary North America Classes 5-7 net orders rose 27% year over year to 20,200 units in September, according to ACT Research [9].

As reported by Transport Topics, ACT Research said used Class 8 truck sales fell 8.8% in August 2026 to 23,800 units [10].

4. What it means for shippers

Budget for higher fuel surcharges

On-highway diesel averaged \$6.29 a gallon in September, up 83 cents from August, and DAT estimated the fuel surcharge portion of dry van rates hit a record 84 cents a mile [1, 5]. Shippers should revisit fuel surcharge tables and routing guides now rather than after invoices arrive.

Freight cost measures rose

The BLS preliminary producer price index for long-distance truckload trucking rose 4.6% in September, and the Cass Freight Index for expenditures rose 20.4% year over year [2, 4]. Shippers with contracts up for renewal should review budgets and discuss rate and capacity terms with carrier partners.

Watch for UCR fee pass-through

FMCSA's Unified Carrier Registration fee increase is scheduled to average 20 percent and take effect October 1, 2026, starting with the 2027 registration year, which could affect carrier and broker cost structures [8]. Shippers should ask carrier partners how they plan to absorb or pass along the new fees, with scheduled increases ranging from \$9 to \$9,329 per entity [8].

Reefer volumes declined

DAT's Truckload Volume Index for reefer fell to 178 in September, down 5% from August and down 10% year over year [5]. Shippers moving temperature-controlled freight should monitor conditions as they plan procurement.

Methodology

The government figures (diesel, truckload producer prices and the freight services index) come straight from the agencies' published data. Every other figure comes from its publisher and is cited by name, the period it covers and its release date. Changes between two months are computed from the two published figures. Figures marked "as reported" come from press coverage of research that is not public; we cite the coverage and have not checked the underlying data.

How this report is made

Research is gathered with AI tools that follow written sourcing rules. Every figure that isn't government data is checked against the page it cites before it can be used, figures seen only in news coverage are labelled "as reported", and each edition is approved before it is published.

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Sources

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- [6] American Trucking Associations. August 2026; published Sep 22, 2026. trucking.org/news-insights/ata-truck-tonnage-index-fell-05-august
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