2026 MARKET FORECAST

Preparing For the Biggest Market Shift in a Decade

DYNAMIC LOGISTIX

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EXECUTIVE SUMMARY

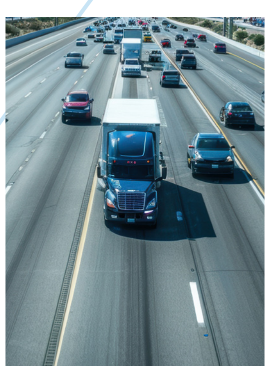
The U.S. freight market is entering what could be the most consequential year since the early COVID era...but this time, the disruption is visible in advance.

Industry analysts warn that we may be on the brink of the largest capacity purge in modern trucking history, with the potential of hundreds of thousands of drivers at risk of exiting the market, bringing "COVID-like spot rates" in its wake.[1]

10–13%
Drivers Exiting the Market Over Next 2–3 Years

3–5%
OTIF Chargebacks Increase

Longer Lead Times
and Routing Guide Failures



EXECUTIVE SUMMARY

NON-ENGLISH SPEAKING DRIVER CRACKDOWNS

- **Thousands of drivers removed monthly** due to language requirements.
- Higher detention fees and missed appointments.
- OTIF chargebacks increase (3–5%).
- Longer lead times and routing guide failures.

DRIVER CAPACITY SHRINKING

- **Up to 500,000 drivers** could exit the market from CDL revocations.
- Capacity tightens → Rates increase 5–15%.
- Less room to negotiate rates.
- Shippers book last minute or unvetted carriers.

REGULATION IS SHIFTING LIABILITY TO SHIPPERS

- **New and proposed federal standards** are formalizing a “duty of care” for shippers in carrier selection and safety.[2]

CARGO THEFT IS AT RECORD HIGHS

- **Cargo crimes** rose 27% in 2024.
- **Losses expected to rise** another 22% by the end of 2025.
- **Total annual stolen value** already exceeding $1 billion.[3]

FRAUD AND DOUBLE BROKERING ARE EXPLODING

- **Double-brokering complaints** have risen 400% since 2022.[4]
- “Strategic theft” and identity-based fraud methods are up nearly 1,500%.[5]

5–15%
Rates Increase

22%
Expected Increase
In Cargo Loss

1,500%
Strategic Theft Increase

Hundreds of Thousands of Drivers Could Exit the Market

DLX MARKET VIEW

You can’t control the market, but you can control how intelligently you buy freight and manage risk. 2026 will reward those who prepare and penalize those who don’t.

UNDERSTANDING MARKET CYCLES

Over the past two decades, U.S. truckload markets have rotated through several distinct phases:

Tight Markets / Capacity Crunches: Carrier-Controlled

- Spot rates spike first as shippers compete for limited trucks.
- Contract rates begin rising shortly after, as carriers renegotiate to avoid losing money relative to the spot market.
- Shippers shift more freight back into contracts to secure capacity and protect service.
- Routing guides break down, tender rejections increase, and secondary/tertiary carriers become unreliable.

Loose Markets Shipper Controlled

- Spot rates fall first and fall fastest as carriers compete for fewer loads.
- Contract rates follow—but with a 3–6 month lag because they are locked in through bids.
- Shippers push more freight through the spot market to capture savings, further weakening carrier margins.
- Routing guides hold, tender acceptance is high, and carriers with thin margins begin exiting.

UNDERSTANDING MARKET CYCLES

COVID VS. 2026:
Why This Cycle Is Different

- **COVID:** A sudden, exogenous shock. Routing guides collapsed in days, capacity evaporated, and shippers reacted hour-by-hour just to keep freight moving.
- **2026:** A slow-developing storm. The signals are here and visible months in advance: driver purges, regulatory changes, fraud sophistication, and theft trends. This is less a surprise storm and more a hurricane you can see forming on radar.

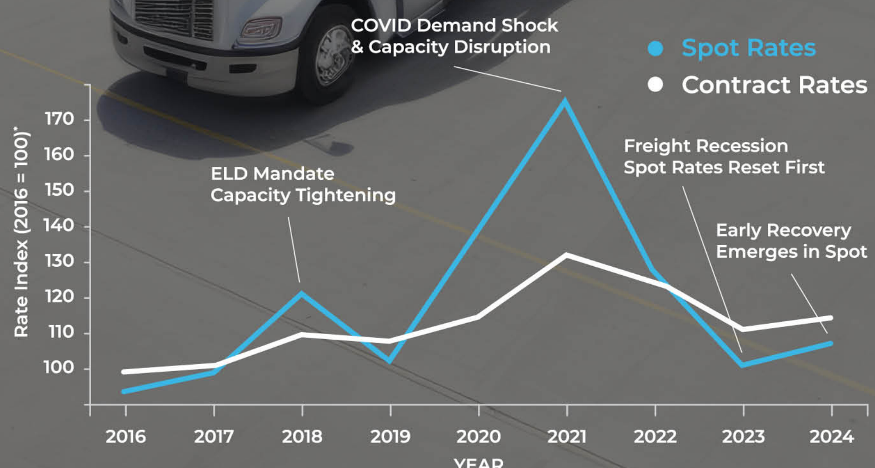
Typically, the supply-demand balance flips every 2–3 years, with spot and contract rates lagging but following the same pattern.

The U.S. market is currently at the late stage of a prolonged loose cycle, with spot rates suppressed and many carriers operating below break even. As regulatory headwinds remove capacity, spot rates will be the first to lift, signaling the transition to a tightening cycle. Contract rates will follow, slowly at first, then sharply, as shippers compete for compliant, high-performing carriers.

THE KEY DIFFERENCE

Shippers have time to prepare, but only if they act before capacity truly tightens.

U.S. TRUCKLOAD MARKET CYCLES (2016–2024)
SPOT VS. CONTRACT RATES[6]



*All values indexed to 2016 = 100 to illustrate relative market cycles, not absolute pricing. Spot rates reflect annualized trends from DAT RateView and SONAR NTI benchmarks. Contract rates reflect lagging behavior using DAT contract data and the Cass Truckload Linehaul Index as a contract proxy.

REGULATORY CHANGES WILL SHRINK CAPACITY & SHIFT LIABILITY

Regulatory shifts are a primary driver of 2026's risk landscape.
DLX sees three major trajectories:

1
NON-DOMICILED CDL ACTIONS

2
ENGLISH LANGUAGE PROFICIENCY (ELP) ENFORCEMENT

3
FORMALIZED SHIPPER "DUTY OF CARE" IN CARRIER SELECTION

1

POTENTIAL DRIVER CAPACITY PURGE
A mix of stricter enforcement around non-domiciled CDLs, ELP, and safety scores could push a massive number of drivers out of the market:

- **Forecasting 500,000 drivers could be removed over the next 1–2 years.**[7]
- **Rate increase between 5–15%, tightened routing guides and extended lead times as shippers compete for safe, compliant capacity.**

2

ENGLISH LANGUAGE PROFICIENCY ENFORCEMENT
Recent changes to CSA scoring and violation categories explicitly call out English-language-proficiency alignment and add new unsafe driving metrics.[8]

DLX Expects:

- 5,000+ drivers per month removed due to ELP-related enforcement and related issues.
- Higher detention fees and missed appointment rates as less compliant carriers fall out of routing guides.
- OTIF chargebacks rising 3–5% for shippers whose carriers cannot reliably meet appointment and communication expectations.

3

FORMALIZED SHIPPER "DUTY OF CARE" IN CARRIER SELECTION
DOT & FMCSA have proposed enforcing shipping standards on shippers through legislative and regulatory activity. Shippers would be treated as active participants in safety and carrier selection, not passive buyers of capacity.

- The proposed Motor Carrier Safety Selection Standard Act would codify a national safety selection standard for entities that contract with motor carriers.[9]
- **Potential Outcomes Include:**
  Fines of $5,000–$25,000+ per violation for using unverified or unsafe carriers.

  Increased legal exposure and insurance scrutiny when accidents involve unqualified or fraudulently represented drivers.

DLX MARKET VIEW

"Good enough" carrier vetting will not be defensible in 2026. Shippers will need documented, continuous, auditable processes.

RISE IN CARGO THEFT, FRAUD & DOUBLE BROKERING

Supply chain risk has shifted from “background noise” to a primary cost and compliance driver.

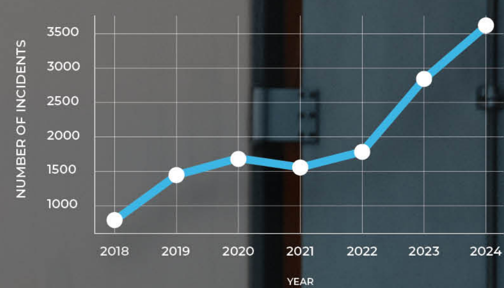
BY THE NUMBERS

Recent data highlights a steep escalation:

- Cargo crimes increased **27% in 2024**, reaching an all-time high, with estimated total losses exceeding **$1 billion** and average theft value above **$200,000**.[10]
- In Q3 2025 alone, U.S. cargo theft incidents rose **29% year-over-year**.[11]
- Organized crime groups are using **identity theft and system infiltration** to impersonate legitimate freight companies and reroute shipments.[12]

Estimated Cargo Theft/Supply Chain Risk Incidents

U.S. & Canada, 2018–2024 (CargoNet-Based)



HIGH-VALUE INDUSTRY TARGETS.[13]

- ELECTRONICS
- PRODUCE
- FOOD & BEVERAGE
- SEAFOOD
- MEAT
- METALS

ORGANIZED FRAUD & DOUBLE BROKERING

The threat isn’t only physical theft at the lot or yard—it’s digital and strategic:

- **400% rise in double-brokering complaints since 2022**.
- 1,500% surge in strategic theft methods like fictitious pickups, false identities, and document forgery since 2022.

DLX MARKET VIEW

For shippers, the financial and reputational fallout can include:

- Paying twice for the same load (fraudster + real carrier).
- Product replacement and chargebacks for non-delivery (3–30% of invoice in some retail programs).
- Legal costs, lost customer trust, and lost shelf space.

CONTINUOUS CARRIER VETTING IS NO LONGER OPTIONAL

Given these trends, carrier vetting must move from a one-time check to a continuous discipline.

DLX RECOMMENDS SHIPPERS CONTINUOUSLY MONITOR:

Authority & identity

- MC, DOT, SCAC, operating authority, company website.

Insurance & safety performance

- Insurance coverage and expirations.
- Inspections, safety record (FMCSA), and CSA metrics.

Behavioral & lane fit indicators

- FreightGuard and similar reports.
- Lane history vs. requested lanes.
- Equipment-to-capacity ratio and power unit count.

Equipment & lease structure

- Owner-operator agreements and exclusivity.
- Verification of no unapproved decals or multiple carrier names on equipment.

Mode Specific Expectations

Truckload (van & reefer):

- Forecasts spot rate growth could increase by 5–6% and contract rate growth by ~2% by late 2026.[14]
- Reefer will feel additional pressure from food & beverage theft targeting and produce seasonality.

LTL:

- Still digesting the aftershocks of major carrier failures and consolidations; network imbalances and regional capacity constraints may persist, especially for dense freight and short-haul lanes.

Flatbed:

- Flatbed markets will face heightened volatility in 2026 due to infrastructure spending cycles, construction seasonality, and a smaller, more specialized carrier pool.
- Shippers relying on flatbed should expect less flexibility, higher spot exposure, and greater service variability.

International & Trade Factors

Tariffs, geopolitical risk, and changing import/export flows continue to reshape port activity and inland routing:

- Tariff and trade policy shifts are contributing to weaker long-haul demand in North America, extended replacement cycles, and selective capital spending by carriers.[15]

DLX MARKET VIEW

If your carrier vetting and compliance monitoring processes haven't changed since 2019, you're already behind the risk curve.

SEASONALITY & VERTICAL-SPECIFIC VOLATILITY

Seasonality remains a powerful driver of volatility, especially in DLX's core verticals.

- **Produce:** Highly seasonal, with tight, region-specific capacity spikes (e.g., transition periods, harvest windows). Visibility gaps and late raw-product arrivals can cause costly plant downtime, paid idle labor, and rejected loads.
- **Meat & Protein:** Steady year-round but with major holiday spikes and strict temperature and OTIF requirements. Prime targets for theft and fraud.
- **Construction & Building Materials:** Peaks linked to project cycles and weather, with heavy use of flatbed and specialized equipment, amplifying capacity constraints in certain regions.

THE RATES YOU SEE

Every rate a shipper sees in 2026 is made up of:

- Regulatory risk & enforcement
- Driver supply & safety metrics
- Fraud & theft exposure
- Carrier cost structure & capital constraints
- Macro-economic demand trends
- Mode- & vertical-specific volatility

DLX MARKET VIEW

As capacity tightens and risk costs are priced in, shippers should expect:

- **Higher all-in costs (freight + accessorials + risk mitigation).**
- **More variability by lane, mode, and season.**
- **Less tolerance among high-performing carriers for low-margin freight or operational friction.**

BOTTOM LINE FOR 2026

PREPARE FOR IMPACT

IMPACT

- **Shippers will pay more** for less reliability.
- **Shippers will spend more** time chasing updates, resolving exceptions, and managing last-minute carrier substitutions.
- **OTIF penalties rise**, customer scorecards dip, and service variability erodes trust.

HOW TO PREPARE

- **Re-evaluate RFP cadence** and strategy.
- **Leveraging a modern technology solution** with automated tracking, escalation rules, and real-time visibility.
- **Align your customer service** and sales around OTIF realities, capacity constraints, and the need for better appointment discipline.

IMPACT

- **Capacity will tighten** and rates will rise—particularly in truckload and temp-controlled freight.
- **Projected 5-6% year-over-year growth** by late 2026 in van and reefer spot rates.

HOW TO PREPARE

- **Consolidate loads**, reduce empty miles, and optimize mode selection.
- **Model scenario**s as capacity tightens and rates change.
- **Compare lane rates** to market benchmarks at the right times.
- **Quickly detect** when carriers consistently deliver expensive outcomes.

IMPACT

- **Risk and liability will increase**.
- **Cargo theft**, fraud and legal exposure tied to carrier vetting and safety selection will fall more so on shippers.

HOW TO PREPARE

- **Continuous carrier monitoring**; not annual or onboarding-only checks.
- **Document carrier-selection criteria** and workflows to demonstrate "duty of care" in the event of an incident or audit.

DLX'S MARKET VIEW FOR 2026

2026 will mark the transition from a fragile, fraud-heavy freight recession to a tighter, risk-priced market where shippers who modernize their tech and compliance practices will gain a durable advantage over those who don't.

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APPENDIX

[1]Yahoo Finance

[2]Congress.gov

[3]Carrier Management

[4]PropertyCasualty360

[5]Safe and Sound Security

[6]DAT Freight Analytics

[7]FreightWaves

[8]Department of Transportation

[9]Congress.gov

[10]Carrier Management

[11]FreightWaves

[12]New York Post

[13]FreightWaves

[14]Arrive Logistics

[15]Reuters