AUGUST 2026 REPORT

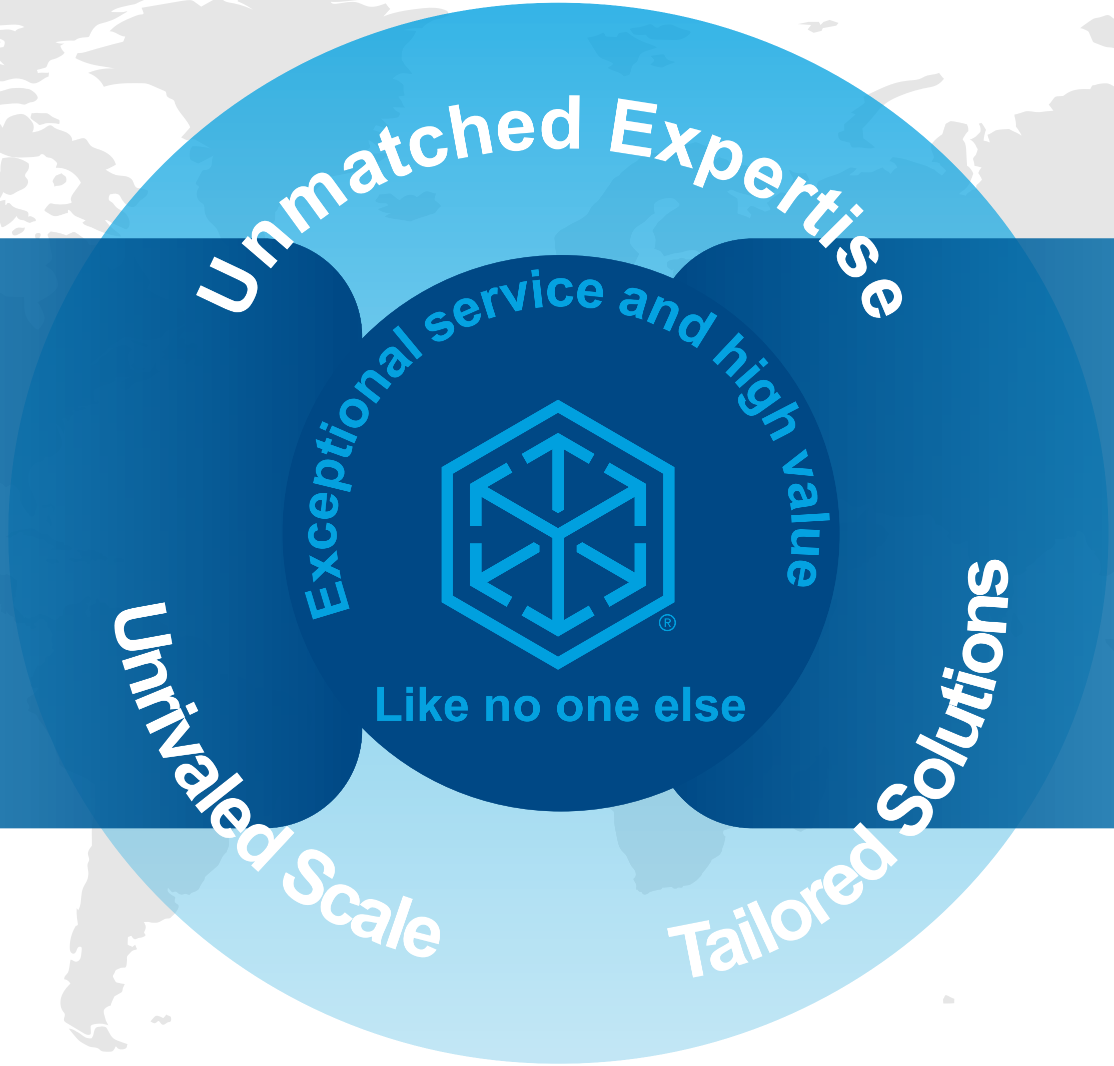
C.H. Robinson Edge™

Simplifying logistics—across the world

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

Shippers

- All industry verticals
- All regions in the world
- Small business to the largest, most complex companies



Carriers

- Airlines
- LTL carriers
- Steamship lines
- Truckload carriers
- Intermodal carriers

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→ Freight Market Update

Key Takeaways

High-level insights at a glance

- **Truckload** U.S. spot market cost/mile forecasts
  - Dry Van:
    - Forecast remains at +34% year-over-year growth for 2026
  - Temperature Controlled:
    - Forecast has been decreased to +33% year-over-year growth for 2026
- **LTL** pricing has increased rapidly, but mostly driven from higher fuel surcharges
- **Ocean freight:** Conditions are easing in some lanes, but service changes, equipment availability, and external disruptions continue creating different outcomes across lanes and regions.
- **Air freight:** Capacity remains available across much of the market, but AI-related technology demand is creating localized pressure at select Asia export origins and contributing to increasingly uneven conditions between markets.
- Iran-U.S. ceasefire has led to decreases in diesel fuel, though market stability remains fragile as markets respond to evolving conditions

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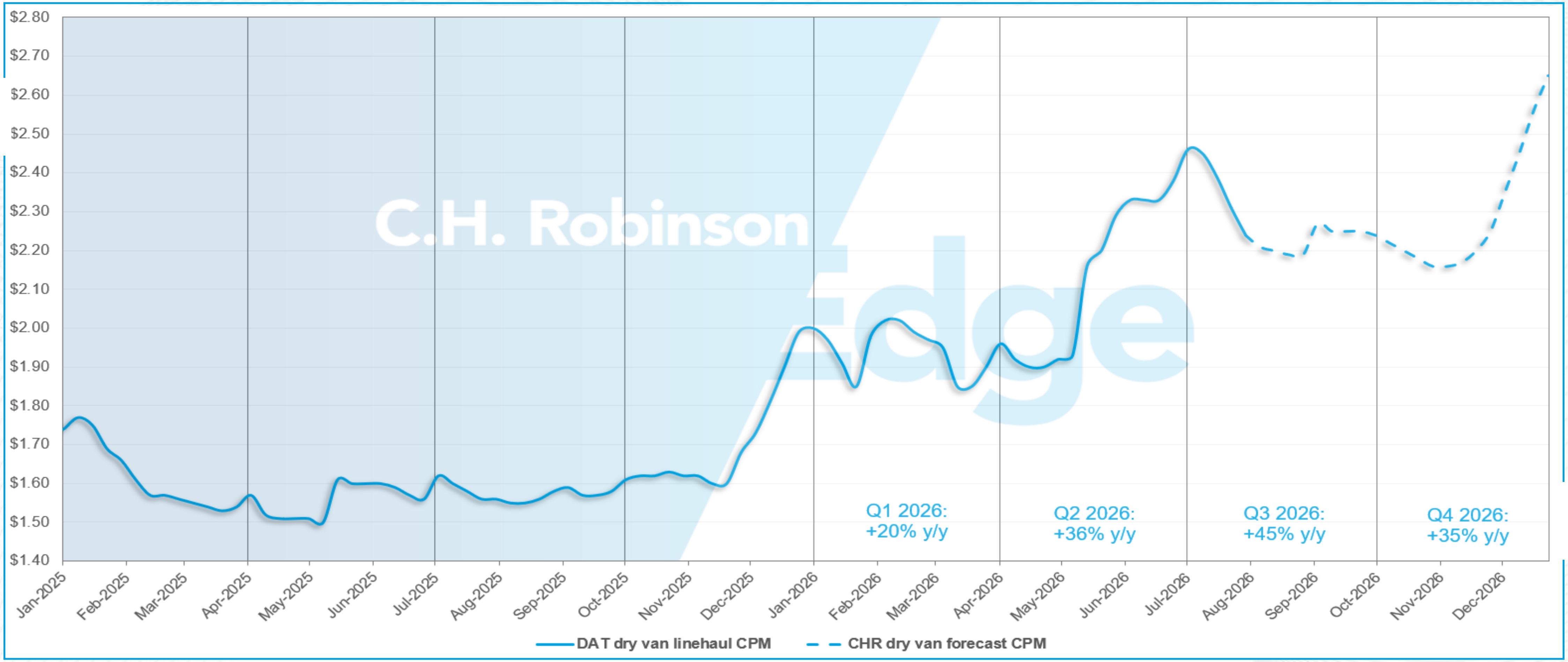
Truckload

U.S. Spot Market Forecast | Dry Van

Truckload

2026 +34% linehaul cost/mile increase y/y



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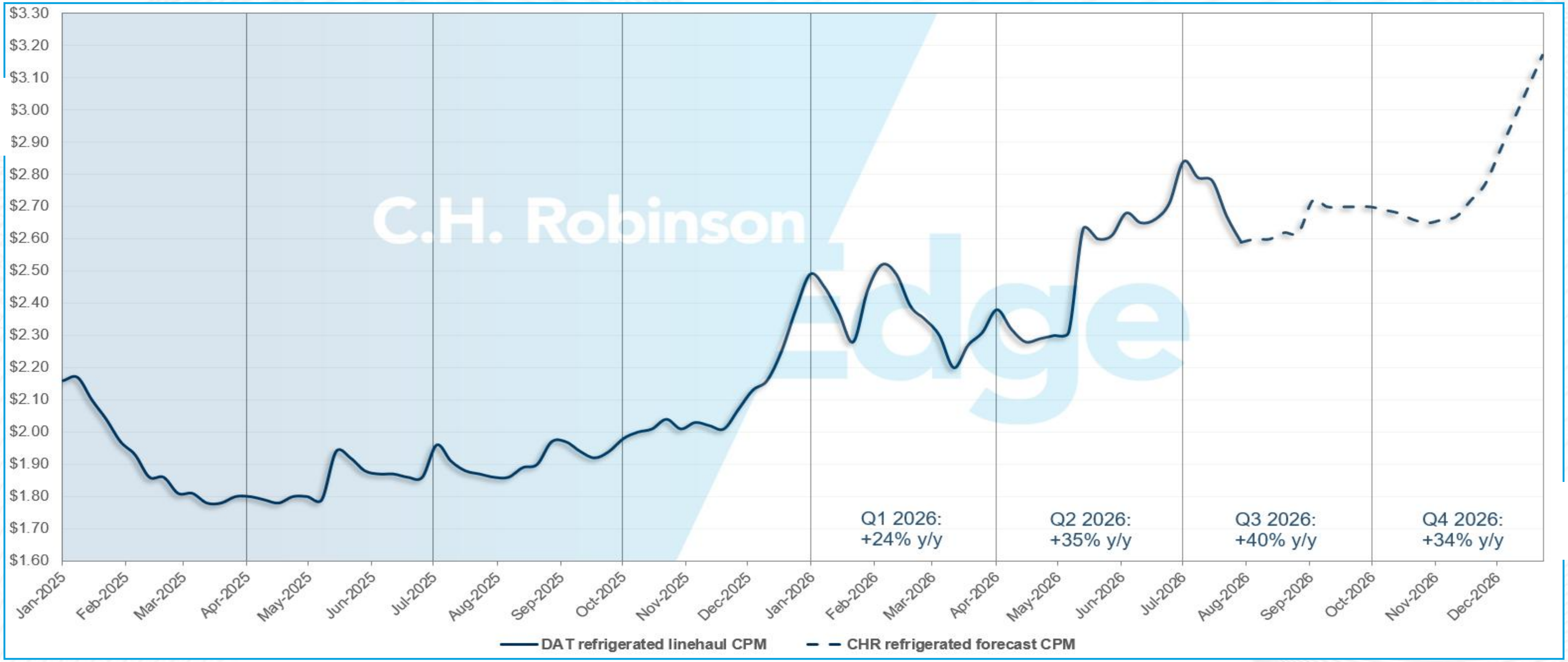
→ U.S. Spot Market Forecast | Temperature Controlled

2026 +33% linehaul cost/mile increase y/y



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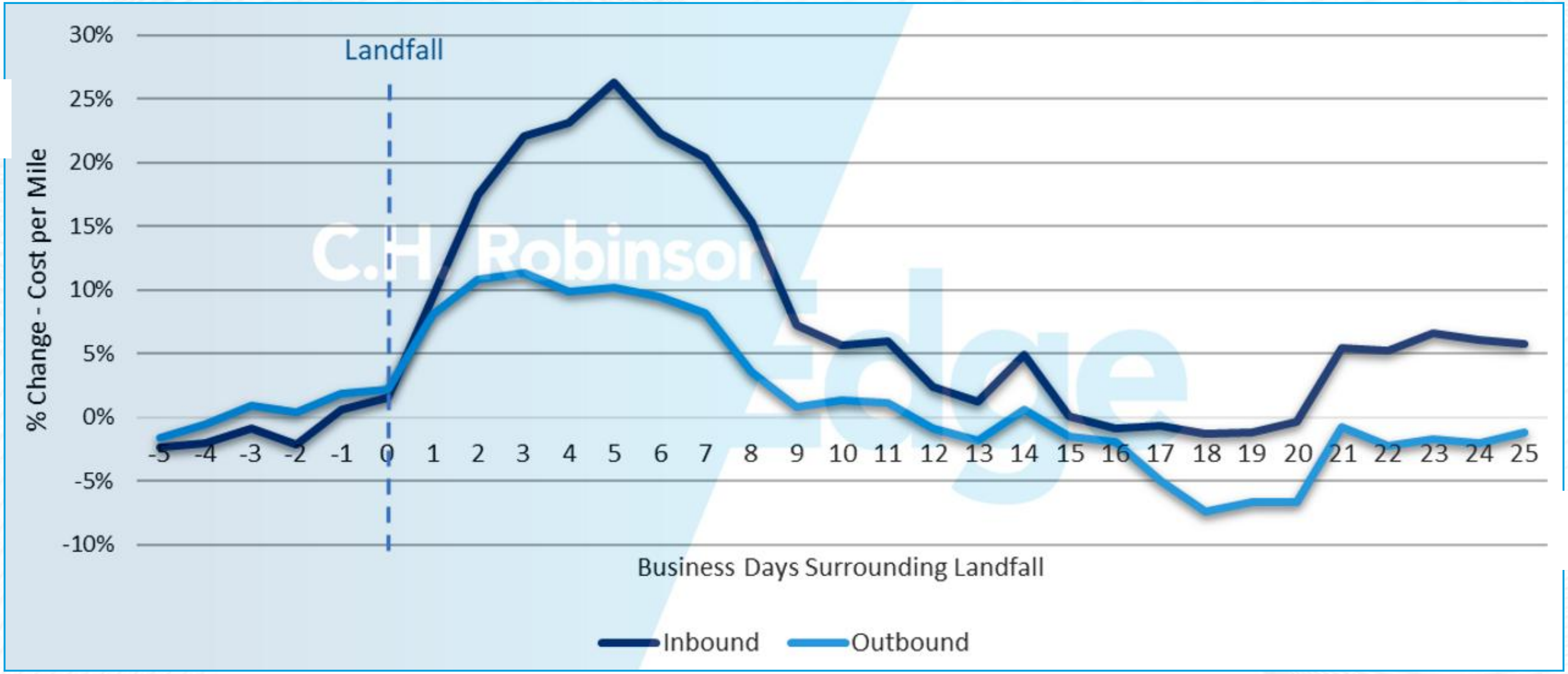
U.S. Truckload | Hurricane Impact

Average impact to freight rates out of hurricane impacted regions



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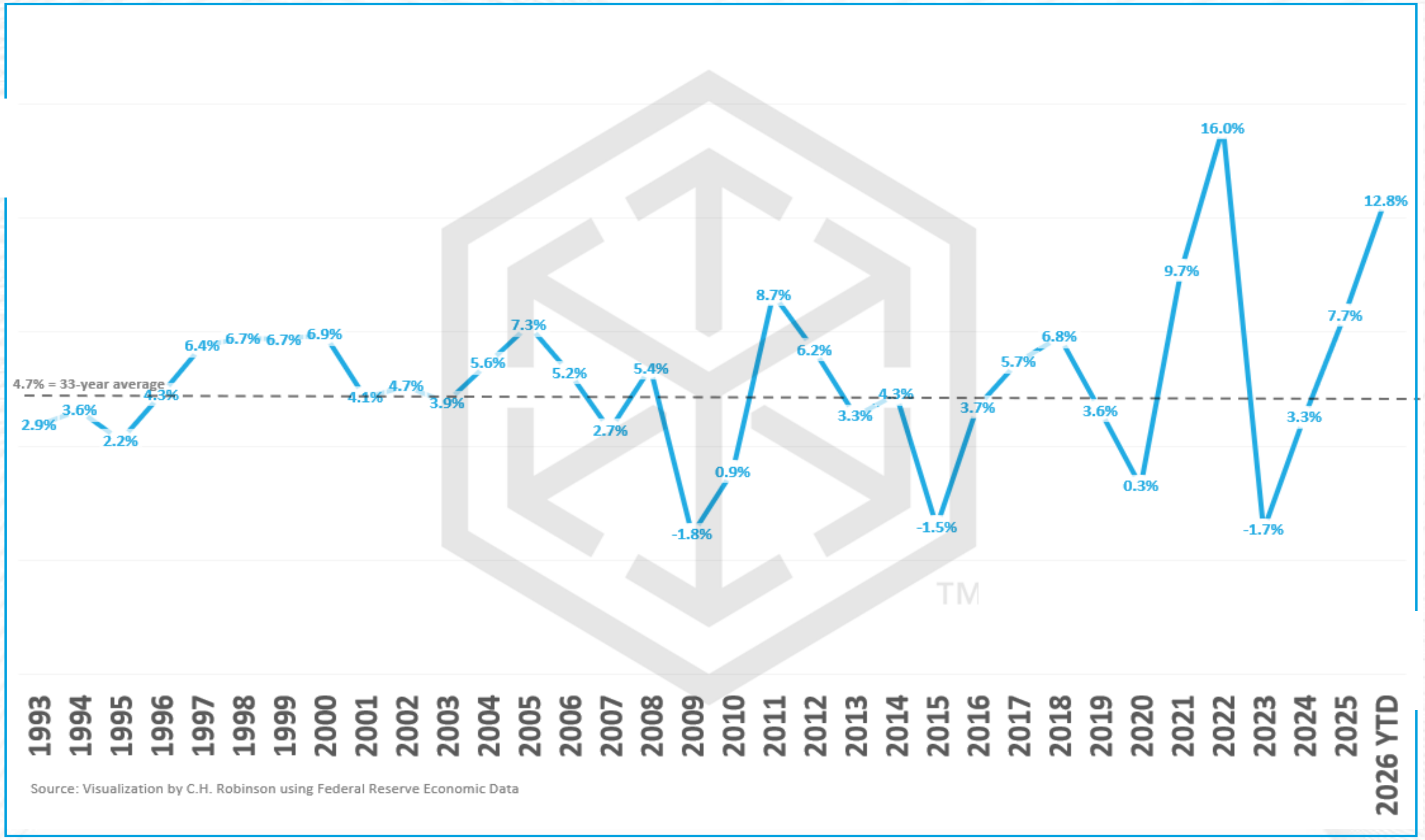
LTL Shipping

U.S. Less-Than-Truckload | Producer Price Index

LTL

Trending year-over-year price changes



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Ocean Freight

→ Ocean Freight

Ocean conditions are easing, but flexibility remains uneven

- **Easing remains uneven:** Some trade lanes are becoming easier to navigate, while others remain constrained by allocations, service changes, or equipment availability.
- **Gateway conditions differ:** Trans-Pacific services into the U.S. West Coast are generally showing more flexibility, while U.S. East Coast and Gulf Coast routings remain comparatively tighter.
- **Service changes affect available options:** Network adjustments and congestion at major transshipment hubs are reducing some direct-service options and creating differences in transit times and schedule reliability.
- **Some origins remain constrained:** Indian Subcontinent exports and selected eastern Mediterranean and Trans-Atlantic routings continue to experience limited allocations, equipment challenges, or fewer workable services.
- **Network recovery may take time:** Middle East developments, Panama Canal conditions, and seasonal weather in Asia continue influencing routings, schedules, and transportation costs. Even where conditions improve, operational changes may not occur immediately.
- **Planning implication:** Match booking timelines to individual trade lanes, verify routing options for time-sensitive freight, and maintain backups where service flexibility remains limited.

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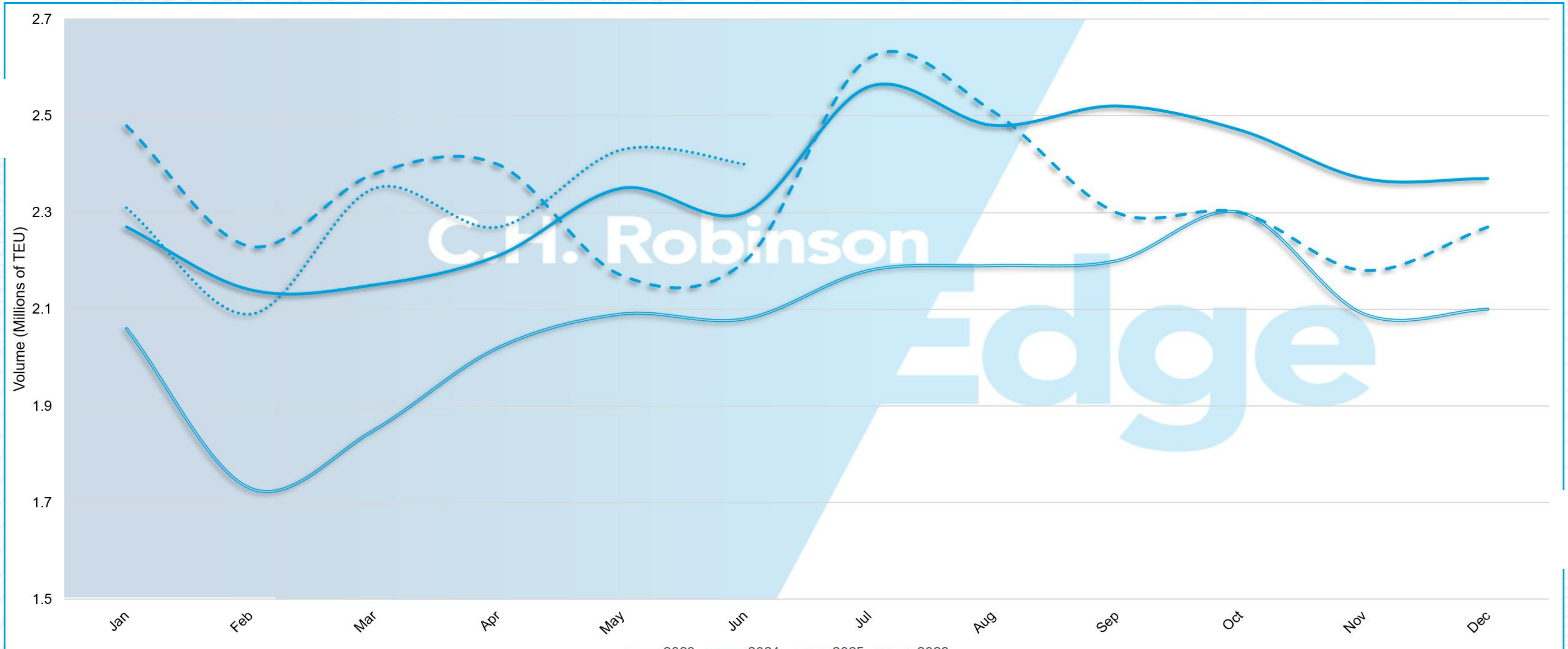
→ Ocean Freight

U.S. container import volumes, 2023–2026



Source: The Global Logistics Shipping Resource Center | Descartes

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Air Freight

Air Freight

Air freight remains balanced, but pressure is becoming more localized

- **Conditions vary by origin:** Capacity remains available across much of the market, but conditions at individual export locations may differ significantly from regional averages.
- **Technology demand may affect other cargo:** Growing AI-related exports from Japan, South Korea, Taiwan, Thailand, and Vietnam could place additional pressure on airport and flight capacity used by a broader range of shippers.
- **Asia–Europe offers greater flexibility:** Softer demand and sufficient capacity are providing more routing and scheduling options across much of China and Southeast Asia.
- **Some markets remain constrained:** U.S.–Australia capacity remains limited, while Oceania imports and South American demand continue supporting tighter conditions for some shipments.
- **External risks remain:** Seasonal typhoons in Asia, fuel-cost volatility, geopolitical developments, and carrier network adjustments could quickly affect otherwise stable markets and create localized schedule disruption.
- **Planning implication:** Evaluate air freight conditions at the origin level and monitor changing cost drivers rather than relying on regional market averages.

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Trade Policy & Customs

Navigating Government & Trade Impacts

Policy uncertainty remains elevated and the regulatory environment gets stricter

- **New Section 301 tariff framework**
  - Establishes a longer-term tariff structure while increasing the importance of customs compliance and country-of-origin visibility
- **USMCA talks point to a longer road ahead**
  - Businesses should plan for ongoing trade policy uncertainty across North American supply chains through 2027
- **Other recent U.S. customs changes**
  - Pharmaceutical tariff elimination reduces landed costs and eases sourcing from UK suppliers
  - Quartz product importers may face rising costs once annual quota thresholds are exceeded
- **U.S. Supreme Court decision and carrier vetting**
  - The ruling is prompting many organizations to strengthen carrier qualification and documentation practices.
- **Non-domiciled CDL legislation and English Language Proficiency enforcement**
  - Stricter eligibility standards could further tighten driver availability
- 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

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