AUGUST
2026

STATE OF THE INDUSTRY

REPORT

SUPPLY CHAIN | DEDICATED TRANSPORTATION | FLEET MANAGEMENT SOLUTIONS

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August 3, 2026 | 1 p.m. ET

Overview

The national freight market slid off its summer peak throughout most of July with both spot and rejection rates moving lower. The flatbed market remains robust, though rejection rates and tender volumes do suggest some easing. Intermodal has also relieved some pressure, but the overall truckload procurement market remains challenging.

Oil prices looked calm at the end of July, but that stability masked a dramatic rise over the course of the month. Ultra low sulfur diesel jumped roughly 28%, from $3.2179/gallon on July 1 to $4.1215/gallon by July 31, while Brent crude climbed about 26%, from $71.57 to $90.12 a barrel. The bigger story, though, is the widening gap between the two: the crude-to-diesel spread blew out to as much as $2/gallon by month's end, up from under 90 cents before the Middle East conflict escalated.

That escalation — as any hope of a ceasefire faded into what's being called a "hot war" — is the driving force behind both the price increases and the unusual divergence between crude and diesel. Diesel supply has taken an outsized hit because much of the crude affected by the conflict (Middle Eastern and Russian) is well-suited to producing middle distillates like diesel and jet fuel. Damaged or shuttered refineries in the region, combined with Ukrainian strikes knocking out a large share of Russia's refining capacity, have squeezed diesel output even as refiners push U.S. utilization rates to unusually high levels to keep up.

Former Goldman Sachs commodities chief Jeffrey Currie remains the most vocal bull on prices, arguing the scale of lost supply from the Iran conflict and Strait of Hormuz closures has exceeded even his own expectations, and that further disruption is more likely than a resolution. Oil executives are more guarded in public: ExxonMobil's CEO has avoided predicting prices but emphasized that the region's crude will eventually need to reach global markets, and that the Strait's reopening remains the key unresolved question.

Fleet counts (six-month change)

Total for-hire fleets	300,027 (+8.8%)
Total private fleets	158,865 (+1.2%)
For-hire oil field specialization	20,190 (+1.4%)
Private fleet oil field specialization	8,256 (-1%)

Tractor counts (six-month change)

Total for-hire tractors	1,810,000 (+2.3%)
Total private tractors	766,799 (+0.6%)
For-hire oil field specialization	326,544 (-1%)
Private fleet oil field specialization	53,747 (+1%)

Active daily rig count (y/y change)

Permian Basin	248 (+1.6%)
Gulf Coast Basin	72 (+24.1%)
Anadarko Basin	59 (+13.5%)
Total	**642 (+11.1%)**

Crude oil prices per barrel (y/y change)

WTI crude	$80.01 (+20.7%)
Brent crude	$83.57 (+24.45%)
Brent-WTI Spread	**$3.56 (+413.9%)**

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Oil market

Given that oil prices ended the month relatively stable over the last week of July, it might be easy to overlook the fact that for the month as a whole, they rose...a lot.

Ultra low sulfur diesel, which is the lifeblood of the trucking industry, opened July with a settlement of $3.2179/gallon. The settlement on the CME commodity exchange on the final day of the month was $4.1215/g.

In the crude market, the global benchmark Brent barrel settled at $71.57/barrel on the first day of the month. On July 31, that settlement was $90.12/b.

That's a 25.9% increase for Brent and 28% for ultra low sulfur diesel (ULSD). But that doesn't really reflect the huge divergence they were taking at the end of the month, when the spread between the two of them was blowing out to record levels that depending on how it was measured could reach $2/gallon.

In between the start and the end of the month, any semblance of a ceasefire or a move toward peace in the Middle East disappeared as the "hot war" replaced the relative silence. That can be seen in the 25%+ increases in those benchmark prices.

But the market bears who still kept a check on prices toward the end of the month–the highest settlement for July was on the 23rd, and it was about $16/b less just three days later–can point to statements from two months ago that the industry was near "tank bottoms" and chaos awaited. Yet while oil prices across the board are higher, it hasn't been the calamity that many have predicted.

Jeffrey Currie is the former head of commodities research at Goldman Sachs. On his own now, he has probably been the most prominent market bull envisioning higher prices, citing the hard math of how much supply has disappeared through the mix of lost crude and products supply as a result of the Iran war and the closure of the Strait of Hormuz.

"I couldn't have dreamed up this kind of a loss of overall supply," Currie said in a podcast interview on X hosted by Mario Nawfal. "I think that the problem is that people are unwilling to believe until they actually see the shortage."

Currie discussed the thin talk of movement on a peace deal over the weekend of July 25-26, rumors that ultimately went nowhere. Yet when trading resumed for the week, oil prices fell.

"I don't know what happened this weekend, other than they were trying to get the price of oil down, because ultimately there's no game plan," Currie said.

His prediction for what he called "the most likely outcome": "Just one big firefight to the end or a major strike. Because whatever they're doing at the incremental margin is doing nothing. It's not helping."

Currie said his bullishness is firmly in place. "I don't think anything here has changed," he said.

What has changed is the relationship between crude and diesel. The simplest–but not necessarily the most accurate–way to look at the spread between the two is to take the front month price of Brent on the CME, break it down to a per gallon price and compare that to ULSD.

There are flaws in that approach. Brent being traded for September delivery is not going to become diesel delivered in August for obvious reasons.

But for non-oil exports, it has the advantage of simplicity. And simply, it tells an incredible story. That spread before the war started was less than 90 cts/g. As July came to a close, it had been above $2/gallon pretty consistently.

Diesel supply has been battered by numerous trends. The crude exported from the Middle East, now constrained or shut completely, has always been of a quality that produced a strong percentage of diesel. Refineries in the Middle East that were built to process those crudes have been closed or damaged.

The expansion by Ukraine into hitting an ever-widening list of Russian refineries has taken anywhere from 25% to 43% of the country's refining capacity offline, somewhere in the neighborhood of 1.5 to 2-million b/d. And Russia is a major exporter of diesel, as its benchmark Urals crude, like the Middle East refineries, is well suited to extract middle distillates like diesel and jet fuel from crude.

The crack spreads in the diesel market are leading U.S. refiners to take advantage of every ounce of their facilities.

The U.S. operating rate during times of strong refining margins will usually come in somewhere in the 90% to 95% range in the weekly report of refinery utilization published by the Energy Information Administration. But with refinery margins at levels that are drawing descriptions like "unprecedented," that rate the last five weeks has been as low as 95.8% to a high at the end of the month of 97.2%.

It has been noted by numerous refining analysts that such a rate carries dangers with it. Refineries are simply not accustomed to running that hard, that long. There are inevitable breakdowns. But for now, with turning crude into refined products as profitable as Rumpelstiltskin spinning straw into gold, they continue to pump out product.

An oil company CEO needs to be relatively restrained in their discussion of how markets will react to events on the ground in the Middle East. Even lesser executives tend to choose their words carefully, which is why it was so shocking at the end of May to hear ExxonMobil vice president Neil Chapman talk about inventory drawdowns that could lead to chaotic "tank bottoms." He referenced the possibility of $160/b crude oil.

In the two months since then, there has been still restricted shipping in the Strait of Hormuz and oil has not gotten anywhere near $160. Even crossing the $100 mark has been rare.

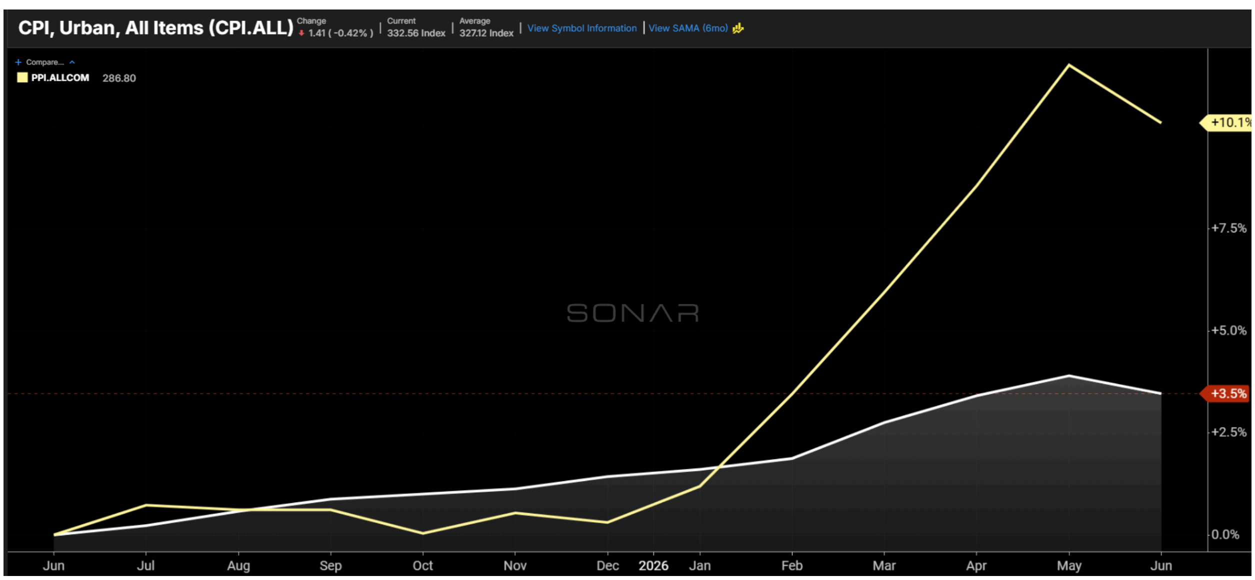
In a late July interview on CNBC, CEO Darren Woods was more restrained than Chapman. He did not offer an opinion on price. But he was clear about what remains at stake in the Middle East.

“In the long term, that resource in the region has to get to market,” Woods said. “The Strait has to open up. It is the main artery of supply for the world that powers economic growth everywhere. And so, eventually, those barrels are going to have to flow. And the only question is, how long will it take to get to some resolution here, so that the trade opens up and that production can come back online.”

National economic outlook

Growing concern

Headline inflation came in much cooler than expected in June, registering 3.5% annual growth versus a 3.8% expectation and May's 4.2% figure. Core values, excluding food and energy, were up 2.6% compared to a 2.8% expectation, unchanged from May. As anticipated, energy was the primary driver, but it shouldn't be ignored that other items were still above the 2% target. The reading is broadly positive given the context, as it suggests inflation may have peaked and could be normalizing. The caveat is that the ceasefire in Iran ended in early July, and oil prices have started climbing again. Until there is clarity on whether the Strait of Hormuz will remain permanently open, the inflation figure will continue to be a focus.



Inflation is the headline economic figure for the moment for two reasons. The first is that it affects consumption: inflation that grows faster than wages means consumers can afford less. Many businesses have forecasted lower demand on this basis and have ordered fewer goods. If conditions change, the risk of insufficient inventory levels rises.

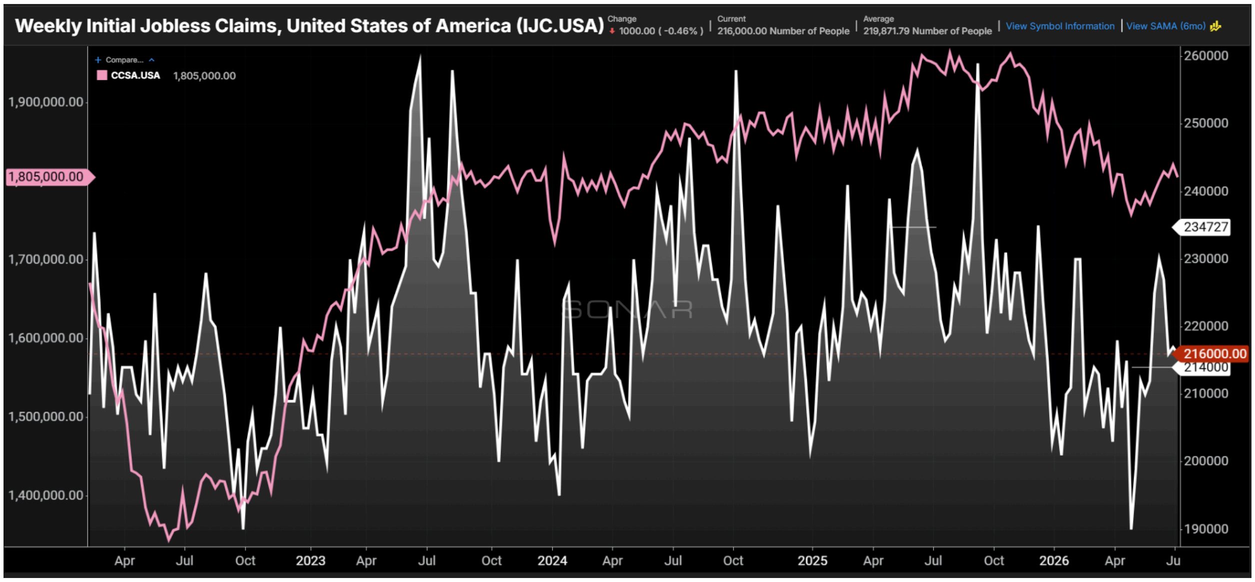
The second, more indirect effect is inflation's influence on monetary policy. If the Fed raises interest rates to curb demand, businesses will invest less, which also reduces demand for freight. There is less expectation that this will happen following June's report.

The labor market is the second key component of the Fed's dual mandate, and it is signaling healthy but fairly stagnant activity. While May's BLS figures were surprisingly positive, they were revised downward in June, from 172K to 129K. The BLS also reported a paltry 56K in nonfarm payroll job creation, missing the ~115K expectation by a wide margin.

Healthcare remained one of the primary growth sectors, with business and professional services also showing strength. Leisure and hospitality had the largest downward revisions, as the sector reportedly saw weaker-than-expected seasonal hiring — suggesting people are traveling less to the US, both internationally and possibly domestically.

ADP's June report, which excludes government hiring, painted a similar picture, missing expectations to the downside with 98K jobs created versus a 110K expectation. Manufacturing was a particular weak spot, echoing the ISM report's findings.

The weak job growth figures were not reflected in the unemployment rate, which fell to 4.2% on significantly lower participation. The BLS Labor Force Participation Rate fell from 61.8% in May to 61.5% in June — one of the fastest monthly declines in recent years, and, more importantly, a continuation of a seven-month trend. The 61.5% reading is the lowest since March 2021, during the COVID pandemic. Lower immigration and demographic shifts — as baby boomers exit the workforce faster than younger generations can replace them — are cited by many economists as the primary drivers.

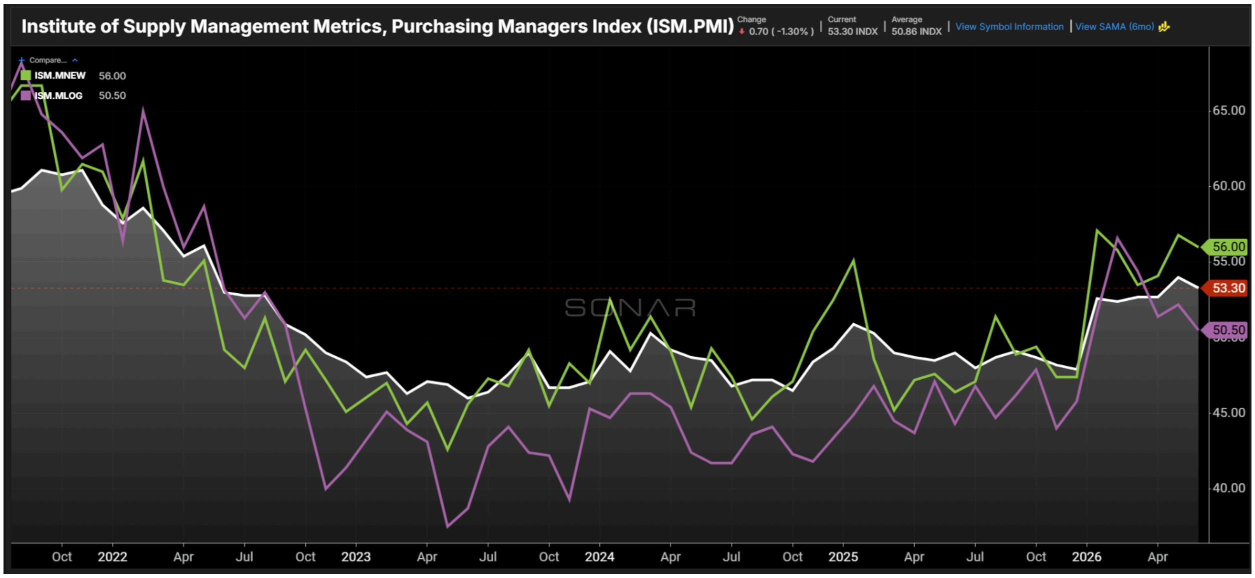


On the other end of the labor market spectrum, separations are not growing meaningfully, and initial jobless claims are averaging well below last year's late spring/early summer average of roughly 234K per week. Continued claims have been inching higher since early April but remain below last year's averages. The data continues to support the low-hire/low-fire narrative and sluggish investment in growth outside the AI technology space.

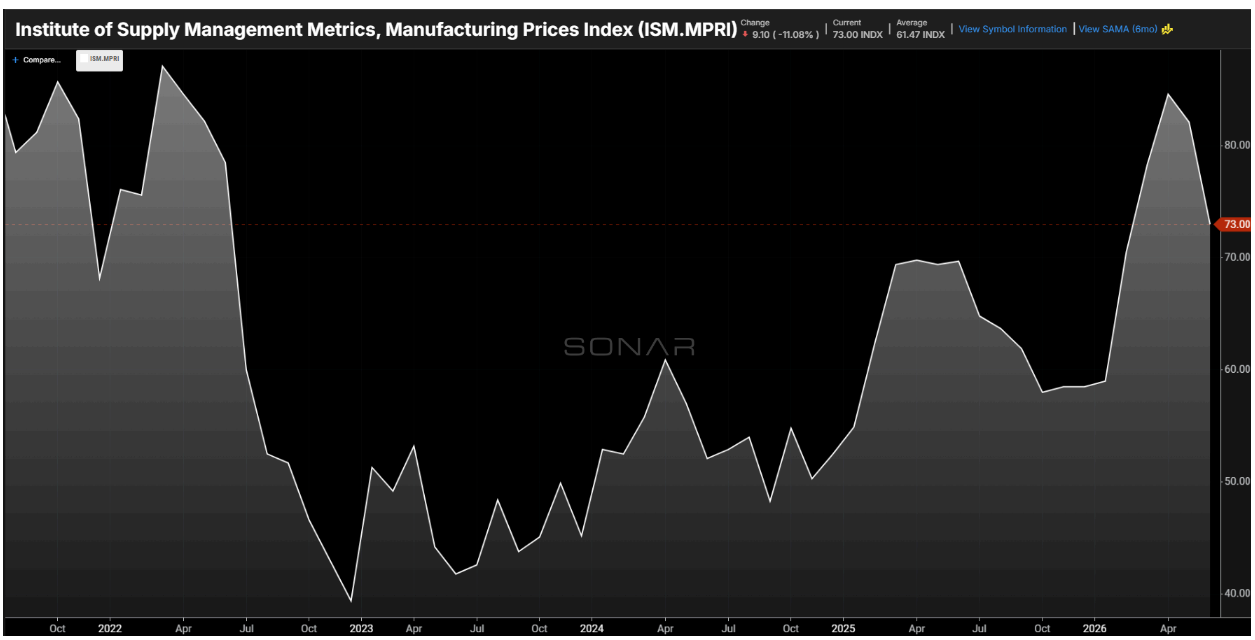
Manufacturing

Expansion Continues, but Cooler Than May

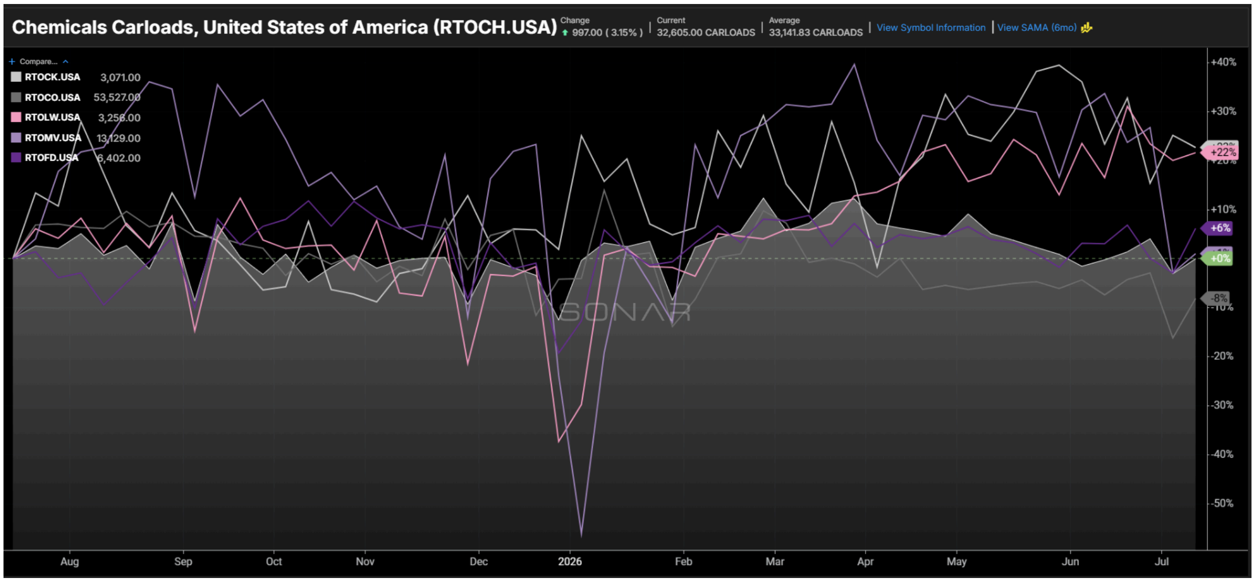
The Institute for Supply Management (ISM) survey registered a 53.3 PMI in June, marking the sixth straight month of expansion. The reading was 0.7 percentage points lower than May's and came in 0.7 points below expectations as well. New orders — a key indicator of future freight demand — were down slightly from May, with a reading of 56 versus 56.8. None of these sequential declines is cause for real concern. The employment component, which has been a soft spot in the report this year, improved from 48.6 to 49.7, though it remains in contraction.



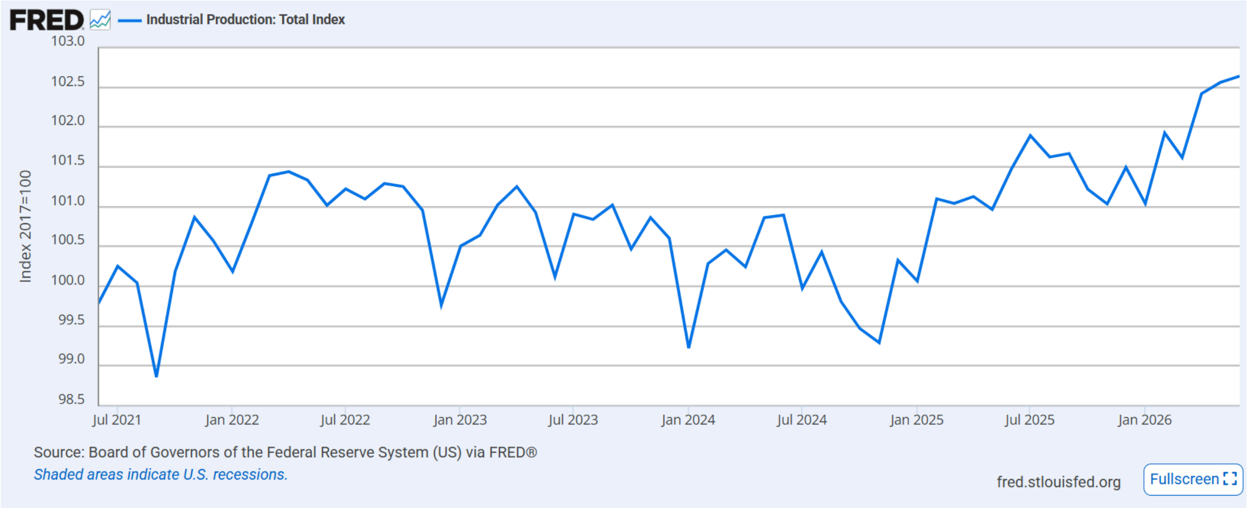
The biggest positive was a reduction in price pressures: the prices index dropped sharply from 82.1 to 73, though it remains inflationary. The biggest negative, aside from continued weakness in employment, was export orders moving into contraction, falling to 48.5 from 50.6 in May.



Overall, the report supports continued factory activity through the summer, with the sector growing at a measured — if slightly cooler — pace in June. Manufacturing job growth remains a concern, as companies are still not hiring despite increased output.



Rail carloads in June provided a stronger signal for the manufacturing sector than the surveys did. Chemical carloads showed modest 1% annual growth, while metals and ores continued to grow at an accelerated rate. Steel carload volumes were up 13% for the 28-day period ending July 4, with metallic ore volumes up 34%. The growth was broad-based across the carload data, which is a positive sign to many economists, as it indicates multiple sectors are contributing rather than just one or two. Coal is the one laggard in the data, though this has less to do with production levels than with substitution toward other energy sources, such as natural gas. Intermodal containers, which relate less to manufacturing and more to retail and consumption, continued their robust growth as well, increasing 11% over the same period.

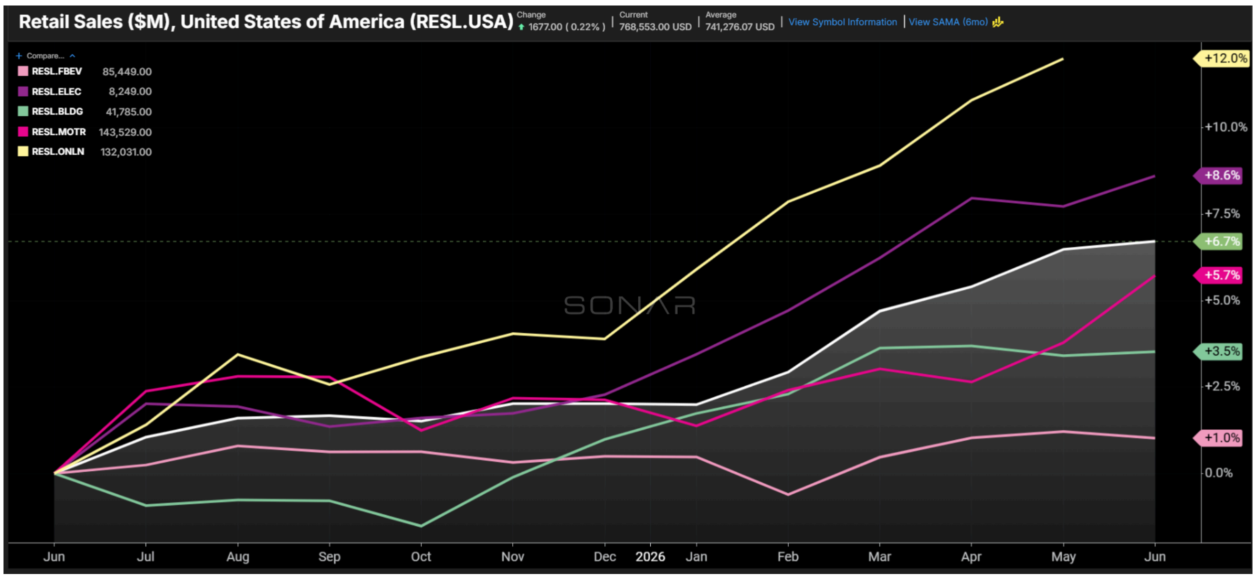


June's industrial production report showed modest 0.1% growth versus May, slightly below the 0.2% expectation. Consumer goods led the charge, posting a 0.3% increase compared to -0.6% in May. Business equipment and construction moved the other direction, each falling 0.4%

Consumer Conditions & Retail

Resillient, but for how long?

Retail data from the National Retail Federation (NRF) Retail Monitor showed strength in June, with total sales up 4.26%. Category strength was broad, with health and personal care up 12.87% y/y and general merchandise up 9.9%. Electronics and clothing each increased roughly 14% annually. The report also noted that last June's figures were notably weak, creating an easy comparison; critics would also argue that inflation is inflating these figures, and that many consumers are spending temporary tax refunds rather than sustained income, putting future readings in question. Prime Day also fell about a month earlier this year, which may have pulled some spending forward and exaggerated June's growth.



Advance estimates of U.S. retail and food services sales for June 2026 — adjusted for seasonal variation and holiday and trading-day differences, but not for price changes — were $768.6 billion, up 0.2 percent (±0.4 percent) from the previous month and up 6.7 percent (±0.5 percent) from June 2025. Total sales for the April–June 2026 period were up 6.4 percent (±0.5 percent) from the same period a year ago. May was revised up: the April-to-May percent change was revised from +0.9 percent (±0.4 percent) to +1.0 percent (±0.2 percent).

Since these figures are not adjusted for inflation, a few points are needed for a clean interpretation. Declining gas prices were a drag on the overall figure — excluding the pullback from May's highs, monthly growth would have been +0.7%, which should be viewed positively. Autos and parts were one of the biggest contributors, rising 1.9%, with e-commerce also up 1.9% thanks to Amazon Prime Day. Sporting goods and hobbies also got a boost from the World Cup.

Consumer sentiment, as reported by the University of Michigan, rose significantly in June, climbing from May's all-time low of 44.8 to 49.5, largely due to the now-ended ceasefire with Iran. While the June reading showed marked improvement, it remains well below historical norms, with inflation the primary concern.

Despite the negative sentiment, actual spending looks solid. May personal consumption expenditures (PCE) increased 0.7%, alongside a similar rise in personal income; real PCE was up 0.3%. Most of the growth came from durable goods, led by motor vehicles and parts (+0.9%) and recreational goods and vehicles (+0.8%). Savings rates held steady near four-year lows, at 3%.

Consumer debt is a bit of a mixed bag. Revolving credit fell in May compared to April, down roughly 4.6% m/m, while nonrevolving credit increased about 1.6% — suggesting consumers pulled back on credit card spending in favor of larger purchases, such as autos. The most concerning trend is the rise in delinquency rates across the board. Q1 delinquency rates rose for all debt categories, most notably for student loans, followed by mortgages and HELOCs in terms of annual increase. This is a trend worth monitoring for overall consumer health going forward.

Overall, spending remains resilient despite a strong headwind of negative sentiment. The low savings rate also suggests this pace may be unsustainable unless inflation eases or income growth improves. Negative sentiment hasn't mattered yet, but that doesn't mean it never will — it remains worth watching, especially alongside the savings and debt data. There is nothing alarming in the trends yet, but consumer health will need to improve, or retail figures will eventually stumble.

Housing & Construction

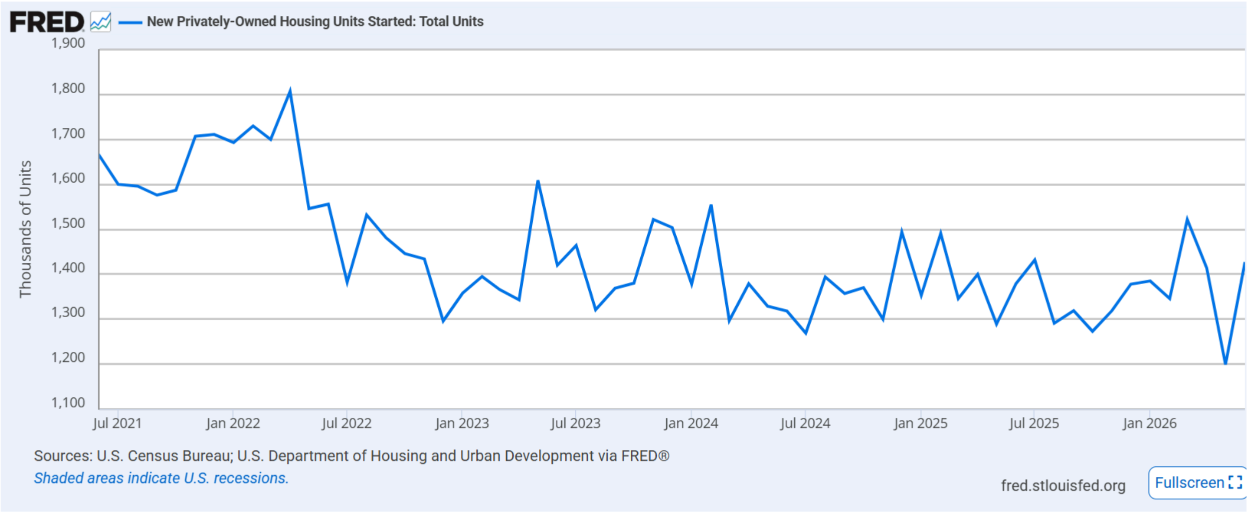
Still weak, but not improving

The housing market remains weak — not a new development — but the broader construction market does appear to be softening as well, which is new. Construction spending in May increased just 0.1% versus April but was down 1.5% y/y. Supply constraints appear to be the primary driver of weakness on the existing-home sales side: resale inventory is relatively thin by historical standards, with only 4.6 million units available compared to the 6 million considered a balanced market. Existing home sales declined 2.4% in June but were up 2.8% y/y.

New home sales, as reported by the Census Bureau, were down 7.3% in May compared to April and down 6.8% y/y. Unlike existing homes, oversupply is closer to the truth in the new-home market, as builders are sitting on 10.3 months of available inventory — and rising. This could help explain the declining starts (as of the July 17 report) and permits.

Privately-owned housing starts in June were at a seasonally adjusted annual rate of 1,427,000. This is 19.0 percent (±15.9 percent) above the revised May estimate of 1,199,000 and 3.5 percent (±14.3 percent)* above the June 2025 rate of 1,379,000.

Note that the margin of error (±14.3%) means the year-over-year comparison isn't statistically significant, and even the month-over-month jump is only borderline given the wide confidence interval — starts data is notoriously volatile.



Single-family housing starts in June were at a rate of 895,000, 0.2 percent (±10.2 percent)* below the revised May figure of 897,000. Multi-family (5+ units) starts were at 513,000 — this segment drove essentially all of the headline gain.

Multi-family units were overbuilt during and following the pandemic, but rents are now firming, encouraging builders to resume activity. Single-family builders remain hesitant, with permits hovering near multi-year lows. Mortgage rates remain a factor, as many homeowners who purchased before the post-pandemic rate spike are reluctant to move and take on a higher rate. The stagnant job market is also a factor: businesses are hiring and firing less frequently, leaving employees less mobile as a result.

Nonresidential spending is contracting as CHIPS Act-driven building booms fade.

Flatbed safety is exacting but essential

Given the open nature of flatbed trailers, it is arguably more important for flatbed drivers to follow best safety practices than for drivers in any other mode. This is compounded by the fact that flatbed drivers are uniquely responsible for ensuring that their loads are properly secured and, if necessary, covered by tarps. Otherwise, cargo can shift or even fall in transit, harming not only drivers and their equipment but also fellow motorists.

Thus, drivers should first choose high-quality straps, chains and binders that are designed to withstand the weight and type of cargo being transported. When loading, drivers must be careful to confirm that cargo is distributed evenly across the deck to maintain stability and to prevent excessive stress on specific areas of the flatbed. If applicable, drivers should employ edge or corner protectors to protect straps from sharp edges as well as sensitive cargo from damage caused by undistributed downward force.

Flatbeds also serve a vital role for the domestic oil and gas industry, in part because safety can be compromised by the (often) time-sensitive nature of such deliveries. As such, it is critical that the pre-trip inspection be fully carried out, not only with regard to the vehicle and trailer but also to the rigging equipment used, checking for frays or other signs of excessive wear.

Finally, special attention should be paid to the surroundings when the flatbed is not in use, particularly during loading and unloading. Trucks should be parked on a surface that is as flat as possible, taking care that the truck is not only level from front to back but also untroubled by side grades. To be sure, side grades need special attention when the truck is in motion, such that a heavy object does not suddenly shift forward into the cab or backward into any traffic. When dealing with hazardous materials, drivers should be aware of potential obstacles during loading and unloading that could impede an evacuation route.

Truck capacity outlook

The trucking capacity outlook is showing signs that capacity is exiting the market, which is needed to firm up pricing, but at a relatively slow rate. The back half of the year is traditionally a period when capacity tightens across modes. But with all the added capacity throughout the year, the usual tightening was muted throughout the fourth quarter of 2023.

The interesting growth areas haven't necessarily been in carriers or tractors but in the number of trailers added over the past few years. When the market reacted to the COVID-19 pandemic, semiconductor shortages prevented new truck order backlogs from being worked through. This led to fleets investing elsewhere, namely in trailer counts, which was one of the first areas addressed when the increased rates were sustained throughout the back half of 2020 and early '21.

With rates falling rapidly, the growth in capacity will likely return to levels closer to 2019 until some of the capacity added over the past year is removed from the market.

Total Fleets, Tractors and Trailers				Percent Change since February 2022		
Time Period	Carriers	Tractors	Trailers	% Carriers	% Tractors	% Trailers
Jul-22	498,170	2,780,000	4,298,588	5.75%	1.83%	14.34%
Feb-22	471,102	2,730,000	3,759,410			
Total For-Hire Fleets, Tractors and Trailers				**Percent Change since February 2022**		
Time Period	Carriers	Tractors	Trailers	% Carriers	% Tractors	% Trailers
Jul-22	300,027	1,810,000	3,022,330	8.76%	2.26%	1.00%
Feb-22	275,856	1,770,000	2,992,449			
Total Private Fleets, Tractors and Trailers				**Percent Change since February 2022**		
Time Period	Carriers	Tractors	Trailers	% Carriers	% Tractors	% Trailers
Jul-22	158,865	766,799	1,147,612	1.20%	0.63%	49.63%
Feb-22	156,979	761,967	766,961			

Source: Federal Motor Carrier Safety Administration monthly census data.

Since February 2022, the total number of fleets, which is filtered to those that report having at least one tractor and 20,000 or more annual miles per tractor on their MCS150 forms, has increased by 5.75%. Carriers have to report the data only once every two years, so the growth over the past two years is evident from the rise in July's numbers compared to February's. The average fleet size (number of tractors divided by fleet count) declined from 5.8 to 5.5, which indicates that growth is stemming from smaller carriers entering the market.

Growth in carrier and tractor counts is emerging from for-hire carriers, which is expected as the number of owner-operators has increased dramatically over the past two years. Overall, the number of carriers has jumped by 8.8% since February, but the number of tractors has increased by only 2.3%. This signals that owner-operators are the largest group to experience growth between February and July 2022.

While the for-hire side of the trucking industry is experiencing gains in carriers and tractors, private fleets are where most of the growth in trailer counts is originating. Between February and July 2022, private fleet trailer counts increased by 49%. Again, it is important to note that carriers have to report this number only biennially, so it really shows the growth over the past two years.

The for-hire market may see some consolidation — and bankruptcies — over the next six to 12 months, but it may not actually show up in the data, with carriers having to report only once every two years and new carriers always entering the market. As the freight market softens, the difference is that drivers will return to the umbrella of large enterprise carriers and thus may actually be double counted at some point in the future.

Total Fleets, Trucks and Trailers with oilfield or liquid/gas specialization				**6 month % Change**		
Time Period	**Carriers**	**Tractors**	**Trailers**	**% Carriers**	**% Tractors**	**% Trailers**
Feb-22	28,446	380,291	1,074,897	0.7%	-0.5%	0.9%
6 months ago	28,260	382,131	1,065,222			
Total For-Hire Fleets, Trucks and Trailers with oilfield or liquid/gas specialization				**6 month % Change**		
Time Period	**Carriers**	**Tractors**	**Trailers**	**% Carriers**	**% Tractors**	**% Trailers**
Feb-22	20,190	326,544	923,705	1.4%	-0.7%	1.2%
6 months ago	19,906	328,902	912,408			
Total Private Fleets, Trucks and Trailers with oilfield or liquid/gas specialization				**6 month % Change**		
Time Period	**Carriers**	**Tractors**	**Trailers**	**% Carriers**	**% Tractors**	**% Trailers**
Feb-22	8,256	53,747	151,192	-1.2%	1.0%	-1.1%
6 months ago	8,354	53,229	152,814			

Source: FMCSA monthly census data.

The capacity landscape for carriers with oil and gas exposure was relatively unchanged from six months ago as their numbers have increased across the board. The largest rise is in the for-hire market, where the number of carriers has risen by 1.4%.

Even with additional carriers in the market, the number of available tractors has declined by nearly 1%, indicating a couple of things: Smaller carriers are entering the market, and larger carriers with exposure to oil and gas are thinning out their fleets.

While the number of tractors has declined in the past six months, for-hire carriers have added trailer capacity to their fleets, increasing the number of available trailers by 1.2% in the six-month span.

Private fleets haven't experienced the same fate, as there were 98 fewer private carriers operating in the oil and gas space over the past six months. Those continuing to operate have added to their fleets, however, as the number of available tractors has increased by 1%.

Total Fleets, Tractors and Trailers with oilfield or liquid/gas specialization in California

Time Period	Carriers	Tractors	Trailers
Jul-22	993	15,858	11,629

Total For-Hire Fleets, Tractors and Trailers with oilfield or liquid/gas specialization in California

Time Period	Carriers	Tractors	Trailers
Jul-22	549	3,651	5,262

Total Private Fleets, Tractors and Trailers with oilfield or liquid/gas specialization in California

Time Period	Carriers	Tractors	Trailers
Jul-22	395	11,799	5,967

Source: FMCSA monthly census data.

Nearly 1,000 carriers based in California were operating in oil field services or liquid/gas specialization as of last July. The vast majority, in both the overall trucking industry and the oil and gas industry, were for-hire carriers. More than 55% of the fleets in California that operate in the space are for-hire carriers, whereas private fleets make up just under 40% of carriers.

Private fleets do make up the vast majority of tractors in California. Of the 15,858 total tractors that operate in the oil and gas industry, 11,799 are from private fleets, which is roughly 75%. For-hire fleets have an average of 6.65 tractors, compared to private fleets with nearly 300 tractors in operation.

The difference in trailers is less dramatic as for-hire fleets have 45% of the trailers in California. But it is important to note that this data only includes owned trailers and not those that carriers have leased.

Ultimately, the capacity outlook appears quite different than it did at the beginning of 2022. The extreme growth over the past two years has passed its peak and is slowly starting to correct itself. However, having to report counts to the FMCSA only once every two years may mean the data does not show the capacity exiting the market as quickly as it actually does.

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