THE AUTOMOTIVE FREIGHT INDEX

THE RETURN OF VOLATILITY

Production shifts, rising costs, and tightening capacity signals are reshaping automotive supply chains.

TOP 3 SIGNALS THIS QUARTER

01 Production volatility is driving inconsistent freight demand

02 Lead time instability is increasing expedited spend

03 Flat demand is masking rising transportation costs

INDUSTRY FOCUS

AUTOMOTIVE MANUFACTURING & SUPPLY CHAIN

EASE

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EXECUTIVE SUMMARY

THE AUTOMOTIVE SUPPLY CHAIN ENTERED 2026 EXPECTING STABILIZATION.

Instead, it is facing a renewed period of disruption.

CONTEXT

Following recovery from microchip-related constraints in 2025, OEMs are navigating:

- Rapid shifts in production strategy (EV → hybrid/ICE)
- Disruption from weather and global supply dependencies
- Rising transportation costs and tightening capacity

The result: a more volatile and less predictable freight environment, where traditional planning models are harder to rely on.

TOP 3 SIGNALS THIS QUARTER

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BY THE NUMBERS

2.8x YOY VOLUME GROWTH

Daily volume baseline rose from 71 in Mar 2025 to 197 in Mar 2026.

2.2x SURGE IN A SINGLE DAY

Q1 2026 produced a surge day more than double the largest spike of all 2025.

1ST CPM PEAK ABOVE MARKET

February 2026 marks first time EASE CPM crossed above market rate, indicating capacity is repricing under stress.

AT A GLANCE

2026 is shaping up as a recalibration year. While finished vehicle demand is projected to remain stable, automotive logistics conditions and costs will not.

Volatility is here to stay. See what's driving it - and how to plan ahead below.

WHAT WE'RE SEEING

EV REDUCTIONS, A PIVOT TO HYBRID AND ICE, AND WEEK-TO-WEEK SCHEDULE FLUCTUATION.

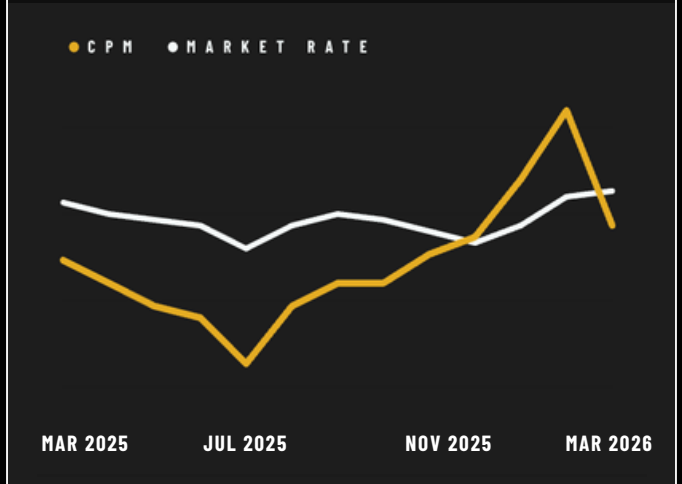
MACRO SIGNALS

- EV production reductions across major OEMs
- Shift toward hybrid and ICE production
- Schedules fluctuating week-to-week; weather disrupting plants + suppliers

EASE INTERNAL DATA

- Volume spikes align with disruption events
- CPM increases track diesel cost + driver capacity constraints
- Early signs of routing guide deterioration; spot pressure rising

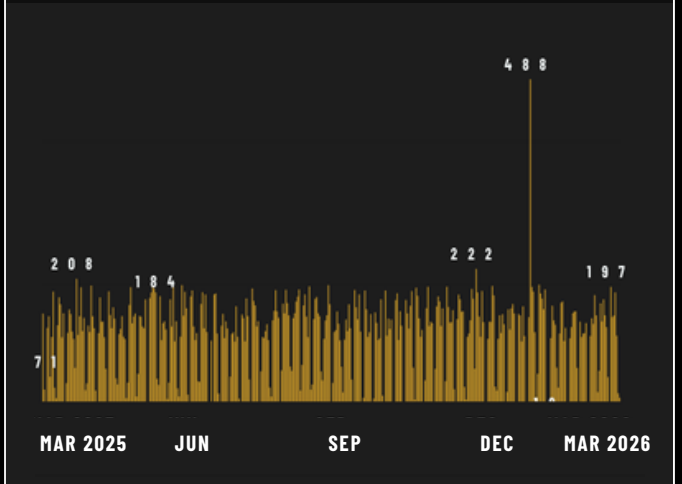
EASE CPM VS MARKET RATE



MAR 2025 – MAR 2026 · INDEXED

EASE INTERNAL DATA

AUTOMOTIVE VOLUME · DAILY LOADS



MAR 2025 – MAR 2026 · CONTROL TOWER

EASE INTERNAL DATA

EASE'S POV

Production volatility is persisting into 2026, creating a more reactive and less predictable freight environment. **EASE anticipates** an increase in carriers exiting the market and in RFQ frequency for dedicated business.

WHAT WE'RE SEEING

SUPPLIER INCONSISTENCY IS PRESSURING JUST-IN-TIME MANUFACTURING.

CURRENT DYNAMICS

While component bottlenecks such as microchips drove disruption in late 2025, Q1 2026 is being shaped by shifting production strategies and broader supplier variability. Lead-time variability remains as one of the most significant drivers of transportation cost increases.

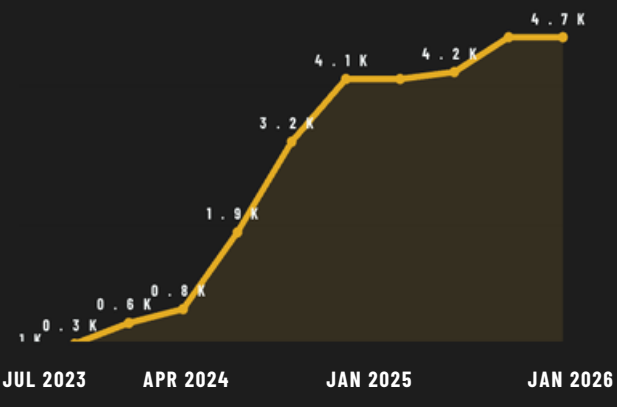
When lead times break down:

- CPM increases due to urgency
- Freight shifts to expedite and premium modes
- Service reliability is critical to successfully keeping costs down and production on schedule

Organizations without a well-vetted and flexible carrier network are more exposed to:

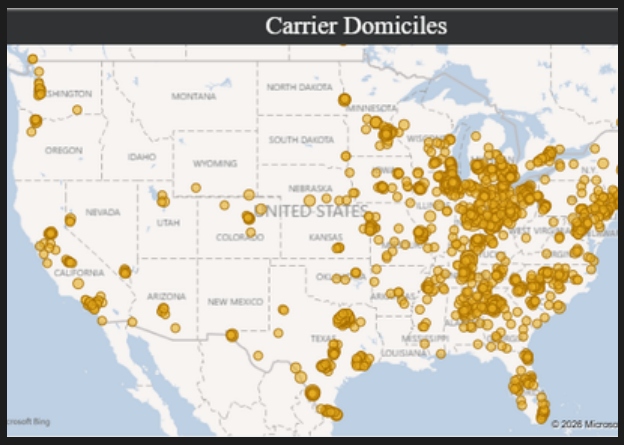
- Higher-cost spot procurement
- Increased operational risk

PNN CARRIER GROWTH



JUL 2023 – JAN 2026 · CARRIERS (K) EASE INTERNAL DATA

CARRIER DOMICILES



EASE AUTO CORRIDOR NETWORK · 2026 EASE INTERNAL DATA

EASE'S POV

Lead time variability is one of the most significant drivers of transportation cost increases. The competitive advantage is shifting from **cost optimization** to **response capability**.

WHAT WE'RE SEEING

SALES STAY FLAT. COSTS DO NOT.

DEMAND SIDE

- Finished vehicle sales projected flat in 2026
- OEMs adding shifts to recover 2025 output
- Production shifting from EV expansion toward hybrid + ICE

COST SIDE

- Diesel, tariffs, regulation, insurance pushing costs up
- CPL increasing; spot market pressure continuing
- Margins on contracted freight tightening

MARKET IMPACT

01	02	03
COST PER LOAD	**SPOT MARKET**	**CONTRACT FREIGHT**
Increased CPL	Upward pressure	Margin compression

While lower auto loan interest rates are expected to support inventory normalization in the near term, stable demand conditions are not translating to cost stability across the supply chain.

Rising diesel prices, tariff uncertainty, regulatory changes, increasing insurance costs, and continued carrier and driver exits are all contributing to upward pressure on transportation costs. As a result, Cost Per Load (CPL) is increasing, spot market rates are showing continued pressure, and margins on contracted freight are tightening.

EASE'S POV

Stable demand ≠ stable costs. The industry is moving toward a margin compression environment, where flat demand is offset by rising transportation costs.

THE EASE PERSPECTIVE

THE AUTOMOTIVE SUPPLY CHAIN IS SHIFTING FROM A RECOVERY PHASE INTO A RECALIBRATION PHASE.

Production variability, supplier inconsistency, and rising transportation costs are no longer isolated challenges — they are occurring simultaneously and reinforcing one another. As a result, organizations are being forced to operate in a more reactive environment, where traditional planning assumptions are becoming less reliable.

Looking ahead, current market signals point to continued volatility in production and transportation, alongside sustained pressure on cost structures. While demand may begin to stabilize, the underlying conditions driving cost and service variability - including fuel prices, carrier capacity dynamics, and regulatory changes — are expected to persist.

HOW YOU WIN

Dense, reliable carrier networks

Real-time visibility into operations

More adaptive transportation strategies

EASE'S POV

In this environment, success will be defined by the ability to respond quickly and operate flexibly. Organizations that invest now will be better positioned to control costs, maintain service levels, and protect production schedules.

WHAT THIS MEANS FOR YOU.

For automotive OEMs and suppliers, the cost of reacting too late is no longer just higher freight spend - it's production disruption.

To maintain production continuity and control costs, organizations must:

- Plan for variability in production schedules, not stability
- Build flexibility into carrier networks to protect against disruption
- Reduce reliance on reactive spot procurement during critical production windows
- Align transportation strategy more closely with real-time production needs

EASE's internal data continues to align with broader market trends, reinforcing a consistent view: **volatility is not a temporary disruption - it is a condition that must be planned for.**

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EASE delivers advanced logistics solutions with a steadfast human touch. Our 24/7/365 personalized service helps overcome the unpredictable and deliver success with EASE.

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