PROCUREMENT INSIGHTS

Q1 2025 vs. Q1 2026

How shippers are adapting their networks amid market volatility, tightening capacity, and a new era of carrier transparency.

As procurement strategies evolve amid persistent market volatility, we analyzed shipper activity across the Emerge platform to better understand how transportation leaders are adapting their networks in 2026. With the transformational recalibration of broker liability risk resulting from the Supreme Court ruling in the Montgomery v Caribe Transport case, transportation professionals are under a microscope more than ever.

The results show a clear shift toward carrier transparency, secure capacity, and an increasing impact from Emerge Premier Carriers.

+75%	+36.8%	65%
Total bid events, year-over-year	Q1 spot volume, year-over-year	Contract freight on Emerge moved by a Premier Carrier

01.

Shipper Procurement Activity

Q1 2025 VS. Q1 2026

Contract Procurement Activity Is Accelerating

Shippers are still conducting traditional annual RFPs, but increasingly supplementing them with targeted mini-bids and spot sourcing events to respond faster to market disruptions.

Key trends observed across the Emerge platform:

+16%
Bid events with 500+ lanes, year-over-year

+75%
Total bid events

–48%
Average lanes per event

> **What this tells us:** Shippers are still conducting traditional larger annual bid events. But, they're moving away from relying *solely* on large annual sourcing events and more toward more agile procurement strategies that allow them to react to rapidly changing market conditions.

Spot Procurement is Becoming Mission Critical

In addition to increased mini-bid activity, spot volumes continue to climb heading into peak summer months. Q1 alone realized a spot volume increase of **36.8% year-over-year**, and continues to climb heading into peak summer months.

> TForce Freight
>
> " We don't rely on a single annual RFP—we run multiple RFPs throughout the year to stay aligned with changing volumes and lane dynamics. This keeps us disciplined on pricing while actively balancing freight across the network, which is critical given ever evolving customer needs. In 2026, we've significantly increased both RFP frequency and lanes bid. We also leverage Emerge spot capacity to manage demand spikes and quickly secure coverage. "
>
> JASON HUNTER
> VP of Transportation @ TForce Freight

02.

Award Strategy Is Shifting Toward Asset-Based Capacity

As volatility increases, procurement teams are prioritizing network stability and tender acceptance reliability over purely lowest-cost sourcing strategies.

Year-over-Year Award Mix by Carrier Type

29.7% → 39.7%
Asset-based carrier awards

59.0% → 50.3%
Non-asset awards

Stable
Hybrid provider awards remained relatively stable

−17%
Average awarded bid rank (at the same time)

This signals a stronger emphasis on cost control while balancing service consistency and execution risk. The significant decrease in average award bid rank provides an indication that contract rates are on the rise forcing shippers to focus more on their most cost-competitive options.

nutrabolt

> “ Emerge's Premier Carrier Program has been a strategic partner, effectively augmenting our network capacity without the overhead of extensive carrier onboarding and vetting. It delivers rate consistency by mitigating spot market volatility, supports elevated service levels and KPI performance, and streamlines carrier touch-points while enabling scalable expansion of our asset-based network. ”

BLAKE DONALDSON
Director, Transportation @ Nutrabolt

03.

Market Disruption Continues to Pressure Transportation Networks

Across all major equipment types, awarded contract rates moved higher year-over-year:

+12% VAN	+20% REEFER	+10% FLATBED

The result is a transportation environment where routing guides are under greater pressure and procurement teams must remain increasingly proactive to maintain coverage and service.

Why Premier Carriers Powered by Emerge Matter More Than Ever

04.

Carrier Transparency Is Becoming a Competitive Advantage

Today, **65% of all contract freight** under management on Emerge is hauled by a Premier Carrier — **up 21% from last year**.

Shippers increasingly recognize that visibility into the underlying carrier at the time of procurement creates stronger, more secure transportation networks.

Instead of discovering who is hauling freight when the truck arrives at the dock, procurement teams gain confidence upfront through verified carrier transparency and committed capacity.

Carrier transparency has become critical in light of the recent Supreme Court case ruling of Montgomery v Caribe Transport.

05.

Unlocking High-Performing Mid-Sized Carrier Capacity

Q1 Emerge procurement analytics found Premier Carriers operating **25–50 power units** to be a sweet spot for new contract awards.

These carriers are often:

- Too small for many enterprise shippers to onboard directly
- Yet large enough to provide exceptional service and reliable capacity within their core operating corridors

In light of the recent Supreme Court case ruling of Montgomery v Caribe Transport, capacity tightened overnight. Access to a stable of vetted, transparent, and reliable providers through the Premier Carrier program has been an invaluable asset for procurement leaders leveraging the Emerge platform.

Shippers relying heavily on traditional brokerage services to find carrier capacity are now facing increased pressure to ensure the underlying carrier and vetting practices are sound. All too often due to a lack of underlying carrier transparency, shippers can only deal with the consequences of a poor performing carrier after an incident has occurred. Through the Emerge Premier Carrier program, shippers have the underlying carrier data and visibility at the time of bidding, virtually eliminating the risk of subpar carriers moving freight within their network.

06.

Securing Stability Without Sacrificing Cost

Through Q1 2026:

–8%
Premier Carrier awarded lanes averaged below market

95%+
Emerge maintained contract tender acceptance

The reason is simple: Capacity commitments are secured upfront with vetted, known, and proven carriers during the procurement process itself.

With the majority of contract freight already aligned to committed Premier Carriers, the Emerge operations team can focus on managing true exceptions instead of constantly replacing failed tenders.

Today:

87% of contract volume tendered to Emerge on a lane awarded to an Emerge Premier Carrier was successfully accepted and delivered by the originally awarded Premier Carrier. Instead of a revolving door of unknown carriers arriving at the dock, shippers are finding repeatable efficiency gains with reliable, consistent commitments from Premier Carriers.

This operational model allows shippers to achieve something that has historically been difficult in freight procurement:

Reliable and transparent carrier capacity without paying a premium.

In other words — shippers no longer have to choose between cost efficiency and network stability. **They can have both.**

Emerge