

THE OPEN DECK



FLATBED • STEP DECK • LOWBOY • RGN • HOTSHOT • LANDOLL • DRY VAN • SPECIALIZED

Flatbed's easing off the summer high and capacity is still walking out the door. Diesel went the wrong way. And two 48-inch gas lines just got greenlit into Katy.



THE MARKET, STRAIGHT

DATA THROUGH AUG 31

01 RATES EASED. CAPACITY KEPT LEAVING.

Flatbed spot eased 0.8% the week ending August 21 and is still up 35% on the year. Truck posts are down 26.3% against last year while load posts are up 30.1%, so the load-to-truck ratio climbed to 36.11 against 20.44 a year ago. Freight softened. Capacity softened faster.

02 DIESEL IS NOT COMING BACK DOWN

Gulf Coast diesel came in at \$5.36 a gallon the week of August 31, down twelve cents on the week and still \$1.99 above last year. The national average is \$5.599, up \$1.87. A one-week dip is not a trend. Budget fuel where it actually is, not where you'd like it.

03 TWENTY-SIX THOUSAND DRIVERS, GONE

More than 26,000 drivers have been put out of service on English proficiency since enforcement was reinstated, and in August FMCSA moved to write that out-of-service rule into the books so every state applies it the same way. That's part of why truck posts are down a quarter on the year.

+35%

FLATBED SPOT YOY

Week of Aug 21, off 0.8% on the week.

\$5.36

GULF COAST DIESEL

Per gallon, week of Aug 31. Up \$1.99 on the year.

588

US RIG COUNT

Week of Aug 28, unchanged. Permian at 267.

36.11

FLATBED LOADS PER TRUCK

Week of Aug 21, against 20.44 a year ago.

Sources. Flatbed rate, load-to-truck ratio and posts: [DAT Freight & Analytics](#), Aug 26 2026. Diesel: [US Energy Information Administration](#), week of Aug 31 2026. Rig count: [Baker Hughes, via Oil & Gas 360](#), Aug 28 2026. English proficiency enforcement: [FreightWaves](#), Aug 10 2026.



WHERE THE WORK IS

THE JOBSITE COMES BEFORE THE PIPELINE DOES

BUILDING SEASON

WHAT GOT SANCTIONED THIS MONTH

TWO 48-INCH LINES INTO KATY

WhiteWater, Devon, MPLX, Diamondback and Western Midstream took final investment decision on August 17 for the Solitude Pipeline System: two 48-inch gas lines from the Permian Basin to Katy. Phase one moves about 2.25 Bcf a day in late 2029 and phase two adds the same in 2030, for 4.5 Bcf total. Long-term firm transportation deals with investment-grade shippers are what got it sanctioned, which is the part that makes it real.

WHY IT MATTERS TO YOUR FREIGHT > FORTY-EIGHT-INCH LINE PIPE, VALVES AND STATION PACKAGES STAGING OUT OF HOUSTON. KATY IS A SHORT HAUL FROM YOUR DOCK.

CORPUS CHRISTI STAGE 3 IS DONE

Bechtel handed over the seventh and last train at Corpus Christi on August 28, finishing Stage 3 and lifting Cheniere's production capacity better than 20%, to roughly 56 million tonnes a year. Construction crews roll off that site. Operations, maintenance and turnaround freight rolls on.

YOUR FREIGHT > TURNAROUND AND MRO WORK REPLACES CONSTRUCTION WORK. SMALLER LOTS, TIGHTER WINDOWS, SAME CORRIDOR.

STRIP THOSE OUT AND IT'S UGLY

Total construction spending ran at a \$2.17 trillion annual rate in June, down 3.2% on the year. Pull data centers out of private nonresidential and what's left is down 7.9%. The boom is real and it is narrow. Know which side of it your work sits on.

YOUR FREIGHT > ENERGY AND INDUSTRIAL WORK IS HOLDING UP. GENERAL COMMERCIAL IS NOT.

DATA CENTERS ARE A QUARTER OF IT

Data center starts hit \$84.1 billion year to date through July, nearly three times a year ago and close to a quarter of all nonresidential building. Texas sits at \$9.9 billion, fifth in the country, helped along by one \$1.5 billion project in July.

YOUR FREIGHT > EVERY ONE OF THEM WANTS GAS LATERALS, METERING SKIDS AND LARGE-BORE FUEL GAS PIPING.

STEEL THROUGH HOUSTON TURNED IN JUNE

Port Houston took 406,452 tons of steel imports in June, up 40%, with total steel tonnage up 46% on the year. Steel still ran 14% behind across the first half, so call it a turn and not yet a trend. General cargo was up 34% for the half.

YOUR FREIGHT > INBOUND STEEL IS ARRIVING AGAIN. YARD SPACE AND OUTBOUND TRUCKS TIGHTEN TOGETHER.

Sources. Solitude Pipeline System: [joint venture release](#), Aug 17 2026. Corpus Christi Stage 3: [BIC Magazine](#), Aug 31 2026. Data center starts: [ConstructConnect](#), Aug 28 2026. Construction spending: [US Census Bureau](#), Aug 3 2026, and [Construction Executive](#), Aug 10 2026. Port Houston: [FreightWaves](#), Aug 4 2026.



LINE PIPE STRAPPED DOWN, MILL YARD

COATED PIPE IS ONLY WORTH ITS COATING

A joint of FBE or three-layer poly leaves the coating plant perfect and arrives however you hauled it. Four things do most of the damage: bare forks and steel slings on the lift, metal-to-metal contact on the bunks, chain laid straight over the coating, and stacking so high the bottom row wears through. We load coated pipe on padded bunks with non-metallic slings, keep the chain off the barrel, and leave bevel protectors on. A holiday detector on the right-of-way two weeks later is a bad place to find a scrape that happened at load-out.

[FBE AND 3LPE](#)
[PADDED BUNKS AND SLINGS](#)
[BEVEL PROTECTORS ON](#)

TELL US IT'S COATED BEFORE WE QUOTE IT AND IT GETS LOADED LIKE IT'S COATED.

PUT THE COATING ON THE RATE REQUEST

Coating is not a note for the driver, it is an equipment decision. Padded bunks, non-metallic slings and no chain across the barrel is a different truck than bare pipe on the same lane at the same weight. Send the coating type, the joint length and whether the ends are beveled when you ask for the rate. Costs nothing to say up front. Saves the argument at delivery.

NOBODY KNOWS WHY KATY IS CALLED KATY

Katy is about to get two 48-inch gas lines, so here's the town. The Missouri-Kansas-Texas railroad built through it in 1893 and the city incorporated in 1945. The state historical association allows the name may come from that railroad, or from the saloonkeeper's wife. Still not settled.

Sources. Katy: [Texas State Historical Association](#). The coated pipe handling and quoting notes are HMH operating experience rather than a cited study.



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GOT COATED PIPE TO MOVE?

Line pipe, OCTG, flanges, fittings and valves, coated or bare. Flatbed, step deck, lowboy, RGN, hotshot, landoll, dry van and specialized, out of Houston and nationwide.

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