

THE OPEN DECK



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

Diesel set a record in September, and that's most of this page: what drove it and what brings it down. Flatbed capacity is still leaving. And Texas froze every data center permit.



THE MARKET, STRAIGHT

DATA THROUGH SEP 28

01 DIESEL HIT A RECORD. HERE'S WHY.

The national average peaked at \$6.529 on September 21, a record, and sat at \$6.382 a week later. Refining fell in the Middle East, Russia and China, so the world came shopping for American diesel. Exports have run near five-year highs since February, and inventories fell below their five-year range in April.

02 THE WAY DOWN RUNS THROUGH HORMUZ

EIA expects diesel margins to stay fat through November, then ease through mid-2027, and only if tanker traffic through the Strait of Hormuz returns to normal. Russian refinery outages run into next year. Washington denied a 90-day export ban on September 23. Don't plan on relief this year.

03 FLATBED CAPACITY IS STILL WALKING OUT

Flatbed spot eased 0.5% the week ending September 25 and runs 28% above last year. Load posts are up 19.2% on the year and truck posts are down 21.4%. That pushed the load-to-truck ratio to 41.38, the tightest of any equipment type. Record fuel won't bring trucks back.

\$6.38

US DIESEL

Per gallon, week of Sep 28. Record \$6.53 on Sep 21.

\$5.96

GULF COAST DIESEL

Week of Sep 28. Up \$2.54 on the year.

+28%

FLATBED SPOT YOY

Week of Sep 25, off 0.5% on the week.

41.38

FLATBED LOADS PER TRUCK

Week of Sep 25, up from 39.34 a week earlier.

Sources. Diesel prices: [US Energy Information Administration](#), week of Sep 28 2026. Causes and outlook: [EIA Short-Term Energy Outlook](#), Sep 9 2026. Export ban denial: [Reuters](#), Sep 23 2026. Flatbed rate, posts and load-to-truck ratio: [DAT Freight & Analytics](#), Sep 28 2026.



WHERE THE WORK IS

COATED LINE PIPE, STRAPPED AND ROLLING

BUILDING SEASON

WHAT MOVED IN SEPTEMBER

TEXAS FROZE EVERY DATA CENTER PERMIT

On September 21 the governor ordered TCEQ to stop issuing permits tied to data centers, air, water and all the rest, until the state's audit is done. That reaches projects the August grid pause missed: sites under 75 MW, sites outside ERCOT and sites building their own power. ERCOT is surveying 461 data centers and targets December 10 for its report. Whether the gas plants feeding them are caught is unanswered.

WHY IT MATTERS TO YOUR FREIGHT > BEHIND-THE-METER GAS WAS THE WORKAROUND. FUEL GAS PIPING AND VALVE PACKAGES FOR THOSE SITES MAY WAIT ON THE AUDIT.

RIGS AT A TWO-YEAR HIGH

The US rig count hit 599 the week of September 25, up four on the week, up 50 on the year and the highest since May 2024. That's three straight weekly gains. Oil rigs are at 455, gas at 135, and the Permian is running 270.

YOUR FREIGHT > MORE RIGS MEANS MORE OCTG AND LINE PIPE LEAVING HOUSTON FOR WEST TEXAS.

TAKE OUT DATA CENTERS, IT'S SHRINKING

Construction spending slipped 0.5% in July to a \$2.17 trillion annual rate. Nonresidential ticked up, and data centers were the entire gain. Without them, nonresidential spending fell a second straight month to its lowest since September 2023. Now read the story at the top again.

YOUR FREIGHT > ONE SECTOR CARRIES THE GROWTH, AND TEXAS JUST FROZE ITS PERMITS.

STEEL THROUGH HOUSTON: NOW A TREND

Port Houston handled 529,000 tons of steel in August, up 49% on the year and its best month since August 2025, driven mostly by imports. General cargo is up 22% through August, with imports up 27%. June looked like a turn. This confirms it.

YOUR FREIGHT > INBOUND STEEL IS LANDING FASTER. YARD SPACE AND OUTBOUND TRUCKS TIGHTEN WITH IT.

POWER DEMAND KEEPS SETTING RECORDS

EIA expects US electricity sales of 4,135 billion kilowatthours this year and 4,211 next, records both, driven by data centers and manufacturing. Texas and its neighbors take the largest share of that growth even with the grid pause. Gas storage heads into winter 5% above average.

YOUR FREIGHT > GENERATION MEANS FUEL GAS LINES AND STATION VALVES, WHEREVER THE PERMITS LAND.

Sources. Permit freeze: [Sidley Austin](#), Sep 23 2026. ERCOT survey: [Houston Public Media](#), Sep 11 2026. Rig count: [Baker Hughes, via BOE Report](#), Sep 25 2026. Port Houston: [BIC Magazine](#), Sep 23 2026. Construction spending: [Construction Dive](#), Sep 2026. Electricity and gas storage: [EIA Short-Term Energy Outlook](#), Sep 9 2026.



ACTUATED BALL VALVE, BLOCKED UNDER THE BODY

A BIG VALVE IS NOT JUST HEAVY

An actuated valve carries its weight high and off center. The actuator rides on top of the body, so the center of gravity is nowhere near the middle of the skid. Strap over the actuator or the handwheel and you bend a stem or crack a housing. Securement belongs on the body and the lifting lugs, with blocking under the body so the flange faces never carry the load. Those faces stay covered, because one gouge on a raised face is a leak at hydrotest. And a crate only helps if the skid under it was built for the weight.

BALL, GATE AND CHECK

ACTUATED AND MANUAL

CRATED OR SKIDDED

VALVES ARE A HANDLING PROBLEM BEFORE THEY'RE A WEIGHT PROBLEM. TELL US WHAT'S ON THE SKID AND WE'LL PUT THE RIGHT TRAILER UNDER IT.

SEND THE DRAWING, NOT JUST THE SIZE

A 24-inch valve tells a carrier almost nothing. What sizes the truck is the weight with the actuator on, the overall height as it'll ride, whether it ships crated or on a skid, and where the lifting lugs are. Height is the one that surprises people: an actuator standing upright can push a load off a flatbed and onto a step deck. The general arrangement drawing answers all of it.

THE MAN BEHIND THE FUEL VANISHED AT SEA

Rudolf Diesel boarded the steamship Dresden at Antwerp on September 29, 1913, bound for England, and was never seen alive again. Ruled a suicide, argued about ever since. The fuel that carries his name set its price record 113 years later, nearly to the day.

Sources. Rudolf Diesel: [History.com](https://www.history.com). The valve handling and quoting notes are HMH operating experience rather than a cited study.



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GOT VALVES TO MOVE?

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

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