

Freight studies reveal gains with intelligent automation

A synthesis of leading 2026 industry reports on how AI is reshaping freight economics, transportation architecture and operational capacity— and **where the competitive advantage is going next.**

96%

of shippers & LSPs are using generative AI in operations

DESCARTES

86%

of shippers expect AI to impact transportation planning

TRIMBLE

81%

treat transportation management as a differentiator

DESCARTES

80%

plan to increase TMS IT spending

UBER FREIGHT / INDAGO

67%

of brokers, forwarders & 3PLs expect more broker exits

TRUCKSTOP

64%

of thrivers focus on automation to improve margins

UBER FREIGHT / INDAGO

EXECUTIVE SUMMARY

The market is no longer treating AI as a future concept. It is treating it as an operating **lever**.

Across many of the most-cited studies in freight and transportation technology, a consistent pattern emerges: AI-powered decision automation is gaining traction first where freight companies feel the most pressure and see the most upside — **in economic decision-making**, transportation infrastructure and **workflow automation**.

Truckstop's 2026 brokerage trends report finds **41% of brokers are deploying AI tools**, while 48% are not — opening a widening technology gap inside the brokerage market. Descartes reports that **96% of shippers and logistics service providers** are already using generative AI in operations, and Trimble finds **86% of shippers expect AI to significantly impact transportation planning and optimization**. Uber Freight's survey work shows **75% of respondents see AI's top value is reducing logistics costs**.

Taken together, the external signal is remarkably consistent. Three pillars rise to the top: **better economic decisions, better-connected operating environments, and better automation of repeatable work**. The next wave of competitive advantage belongs to companies that strengthen freight economics, modernize transportation architecture, and expand operational capacity through intelligent automation.

"The strongest AI story in freight is not generic automation. It's better commercial decision-making."

FROM THE ANALYSIS · THEME 01

HOW WE FRAMED THIS RESEARCH

This brief is built from leading industry studies rather than one-off opinion pieces.

Descartes — 9th Annual Transportation Benchmark. 616 participants, evenly split between shippers and LSPs across the U.S., Canada, and Western Europe. Also cited: 2025 Forwarder/Broker Benchmark — 434 freight forwarders and customs brokers across North America, EMEA, APAC, and Latin America.

Trimble / Transporeon Pulse Report. Over 230 supply chain and logistics executives surveyed across Europe and North America.

Truckstop & Bloomberg Intelligence. Broker-focused 2026 findings on AI deployment trends and operational priorities.

Uber Freight / Indago. AI value and cost-reduction signals, reported via Food Logistics.

THEME 01 · RATE EVERYTHING

Economic intelligence engines at the core of freight

Pricing, optimization, forecasting, and rating quality—where AI earns its place first.

THEME 02 · CONNECT EVERYTHING

Modular, composable transportation architecture

AI delivers full value inside connected environments, not isolated point solutions.

THEME 03 · AUTOMATE EVERYTHING

Capacity expansion without added headcount

Winners use AI to increase throughput, reduce manual touches, and scale output without scaling labor.

THEME 01 · RATE EVERYTHING

Economic intelligence engines at the core of freight

AI is earning its place first in the parts of freight that directly shape margin—pricing, optimization, forecasting and rating/quote quality.

75%

say AI's top logistics value is reducing costs

UBER FREIGHT / INDAGO

65%

say improving operational efficiency is a main driver for AI in logistics

FOOD LOGISTICS

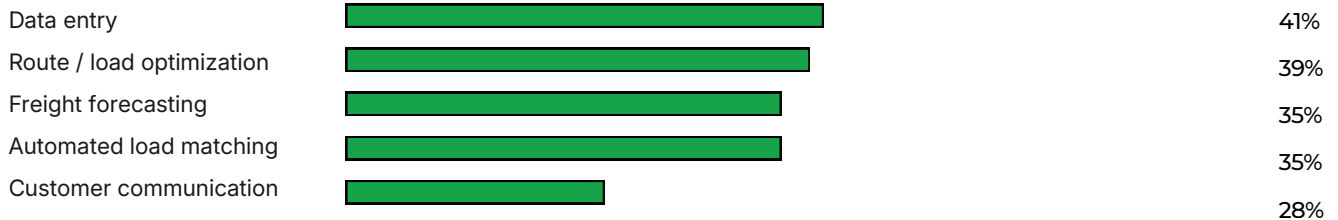
59%

say pricing & lane optimization is AI's primary value driver

TRIMBLE

Where generative AI is being used most in freight operations

Top Gen AI use cases reported by shippers and LSPs · Descartes 9th Annual Transportation Benchmark (n=616)



The clearest finding across the studies is that **AI is earning its place first in the parts of freight that directly shape margin**. Trimble reports that 42% of carriers are already deploying AI for pricing and lane optimization. Descartes' top generative AI use cases cluster around the same commercial decisions: data entry, route/load optimization, forecasting, and load matching.

Uber Freight's findings reinforce the point from the demand side. 75% of respondents cite reducing logistics costs as AI's top value; 65% cite improved operational efficiency.

The market is not gravitating toward AI because it sounds modern. It is gravitating toward AI where it improves the economics of transportation: **faster pricing, better forecasting, more disciplined execution, and stronger margin control**.

That is exactly the territory covered by the idea of an **economic intelligence engine at the core of freight** — rating intelligence, agreement logic, pricing discipline, freight forecasting, and margin protection.

SO WHAT

The strongest AI story in freight is not generic automation — it is better commercial decision-making. The market clearly supports technology built around rating intelligence, agreement logic, pricing discipline, freight forecasting, and margin protection.

THEME 02 · CONNECT EVERYTHING

Modular, composable transportation architecture

AI works best inside connected transportation environments, not isolated point solutions — and the market is putting capital behind closing the integration gap.

81%

treat transportation management as a differentiator

DESCARTES

80%

plan to increase TMS IT spending in 2026

DESCARTES

57%

say easier integration with existing tools would accelerate AI adoption

FOOD LOGISTICS

The automation gap between top and bottom performers

Share of organizations that are fully automated, by financial performance tier · Descartes 2026



Only 17% of organizations describe themselves as fully automated today — and more than a third remain heavily or mostly reliant on manual processes. The gap between leaders and laggards is now a 10x spread.

Descartes reports that 81% of shippers and LSPs view transportation management as a differentiator, while 80% plan to increase TMS IT spending. Trimble reinforces the same point from an ecosystem perspective: AI's full value emerges in connected environments enabling seamless data exchange, with 43% of shippers citing enhanced predictive capability and 55% of carriers pointing to smarter load matching as the top benefit of combining AI with a network-based TMS.

Food Logistics identifies the practical barrier: 57% say easier integration with existing tools and workflows would accelerate AI adoption. The market doesn't simply need more software — it needs transportation intelligence that plugs into the existing stack, connects economic and operational logic, and improves decisions without forcing a rip-and-replace event.

SO WHAT

The architecture story is no longer optional — it is becoming part of the AI value story itself. The research supports an API-first, modular infrastructure that modernizes transportation logic without forcing a full system replacement .

THEME 03 · AUTOMATE EVERYTHING

Automation that expands capacity **without adding headcount**

Winners are using AI and automation to increase throughput, reduce manual touches and improve responsiveness — while keeping humans in the loop for judgment.

67%

off forwarders and customs brokers view technology as fundamental or highly important to growth

DESCARTES

64%

of top-performing firms focus on automating processes to improve margins

DESCARTES

41%

of brokers are actively deploying AI tools today

TRUCKSTOP / BLOOMBERG

Truckstop reports that 41% of brokers are deploying AI tools, and more than 40% of brokers plan to deploy productivity tools powered by AI or machine learning in 2026. In Descartes' forwarder and broker benchmark, 25% cite manual workflows as the top inhibitor to growth, and 55% point to implementing new technologies as the top strategy to grow over competitors.

Trimble adds an important nuance: even with automation rising, most companies still want people in the loop. thirds of shippers and more than half of carriers see AI's primary role as augmenting human decision-making rather than replacing it.

The strongest productivity story in freight is not labor elimination. It is helping existing teams quote faster, process faster, respond faster, and manage more complexity without adding labor linearly. The point is not fewer people — the point is more output, better consistency and more room for human judgment where it matters most.

The market is hungry for automation that expands execution capacity, protects service levels, and reduces dependence on manual workarounds — the kind of automation that removes friction from real freight work, not the kind that adds another dashboard.

BOTTOM LINE

Across the leading 2026 benchmarks, the external signal is remarkably consistent: the market is moving toward AI where it creates measurable value — better economic decisions, better-connected operating environments, and better automation of repeatable work.

The next wave of competitive advantage will come from companies that strengthen freight economics, modernize transportation architecture, and expand operational capacity through intelligent automation.