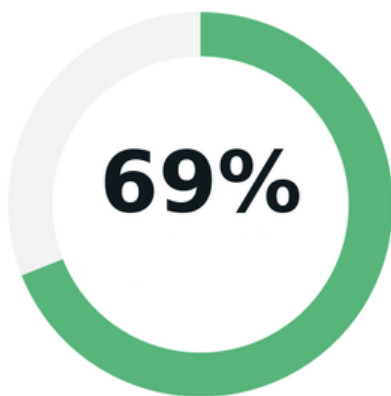
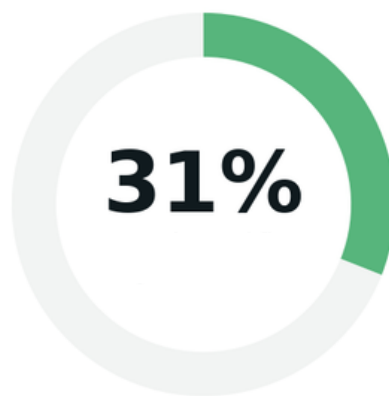


The Margin Leak in Logistics

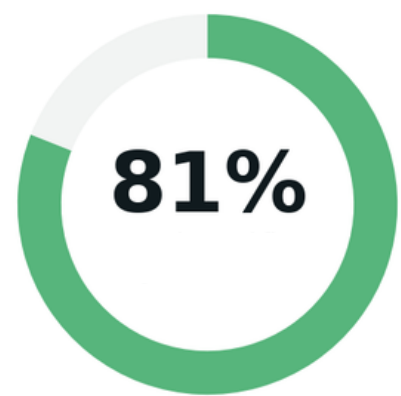
How manual rating and disconnected decision layers drain freight profitability and how AI-powered automation can help workers fix it.



of organizations still run pricing, rating, and routing manually



name a fragmented data layer or limited leadership support as the top barriers to AI value



name at least one workflow ready for AI-driven automation today

100-respondent survey across freight, transportation, warehousing and logistics organizations.
AN INDEPENDENT BENCHMARK REPORT • PREPARED FOR G2MINT • JUNE 2026

EXECUTIVE SUMMARY

The hidden cost of manual freight decisions.

Logistics leaders are caught in a margin squeeze. Cost reduction is the top business pressure for 37% of organizations, with margin protection right behind at 35%. Yet the workflows that most directly shape cost and margin (carrier selection, rating, routing, tendering, accessorial decisioning) are still being run, in whole or in part, by hand.

Across the 100 freight and transportation organizations surveyed, 69% report that a moderate, large, or near-total share of their pricing, rating, procurement, and routing decisions are still handled manually. That manual layer is where margin quietly leaks: a rate keyed wrong, a fuel surcharge missed, a carrier picked on familiarity rather than fit. None of these are visible on a P&L. All of them compound.

AI and automation are already paying off where deployed. Respondents point to better margin protection (12%), faster quote and procurement turnaround (12%), and the ability to handle more volume without adding headcount (16%) as the most measurable outcomes. But adoption is uneven, and value is rarely measured. Only 1% of organizations aggregate and report AI value at the executive level.

WHAT THIS REPORT COVERS

- Where the margin pressure is coming from, and why cost-per-shipment is the headline number that doesn't tell the whole story.
- Where manual work hides in modern freight operations: the decision-rich workflows where rating errors, surcharge gaps, and bad carrier picks accumulate.
- Why so many AI investments stall, and what to look for in a solution profile that doesn't.
- What the early winners are doing differently, and the path forward for logistics and operations leaders.

"The fragmentation that creates manual work is the same fragmentation that prevents AI from delivering value on top of it."

FROM THE ANALYSIS · CHAPTER 03

CHAPTER 01 · THE PRESSURE

Cost and margin are the headlines, **but the story is decisioning.**

When freight and logistics leaders are asked what is keeping them up at night, two answers dominate. Reducing operating costs per shipment, load, order, or transaction is named by 37% of respondents as a top business pressure. Improving gross margin, contribution margin, or transportation cost performance is named by 35%. Together, they describe a market where pricing power is thin, customer expectations keep rising, and every basis point of cost matters.

Cost and margin dominate the logistics pressure list

Top business pressures, % of respondents citing as a top pressure (n=100)

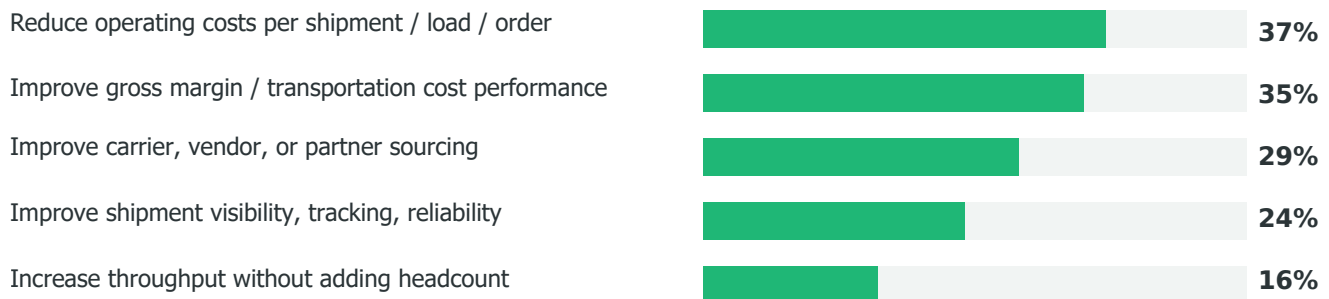


FIGURE 01 · TOP BUSINESS PRESSURES

WHY THIS MATTERS FOR OPS LEADERS

Cost-per-shipment is the headline number, but cost-per-shipment is an outcome. It is produced every single day by thousands of small rating, sourcing, and routing decisions. When those decisions are made on instinct, in spreadsheets, or by re-keying data between portals, the headline number drifts in the wrong direction without anyone catching it. The report calls this margin creep.

WHAT TO LOOK FOR IN A SOLUTION

- Decisioning-grade rating: not just a rate lookup, but a real-time engine that compares contract rates, spot rates, accessorials, and surcharges in one pass.
- Margin-aware routing: surfaces the lane and carrier that protect margin, not just the cheapest line on the tender screen.
- Per-shipment economics: exposes loaded cost, expected accessorials, and projected margin before the load is tendered, not after the invoice arrives.

CHAPTER 02 • WHERE MARGIN LEAKS

Where manual work hides and bleeds margin.

The most striking finding in the data is how concentrated manual work is in the workflows that most directly affect margin. Carrier, vendor or partner selection is the single most manual workflow in freight today, with 41% of respondents citing it as an area of significant manual effort. Load coverage, shipment planning, routing, and capacity coordination is right behind at 39%. Spot pricing, tendering, and procurement decisions remain manual at 29% of organizations.

Decision-rich workflows are the most manual

% of respondents citing as a high-manual-effort workflow

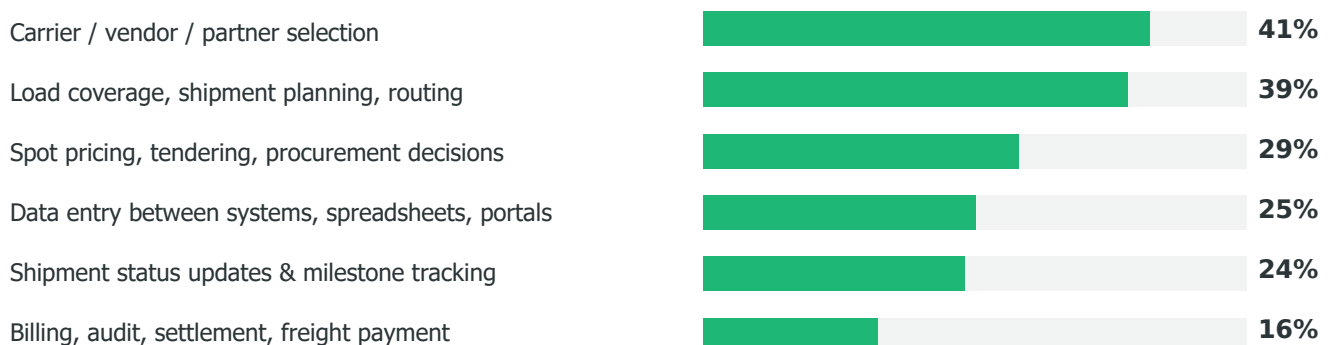


FIGURE 02 • THE MOST EXPOSED WORKFLOWS

Manual is not the exception. It is the system of record.

Looking at breadth of manual processing across an organization, only 4% of respondents report that almost none of their pricing, rating, procurement, and routing decisions are handled manually. 42% describe a moderate share as manual. 20% describe a large share. 7% (roughly one in fourteen organizations) say nearly all of these decisions are still handled by hand.

Percent of Rating/Routing Decisions Being Handled Manually

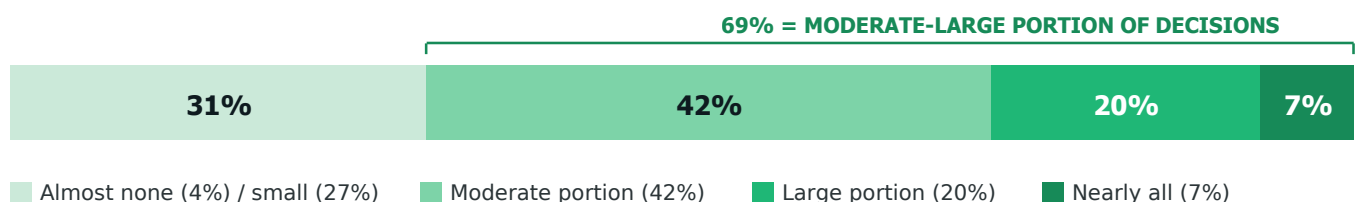


FIGURE 03 • DISTRIBUTION OF MANUAL PROCESSING

CHAPTER 02 • CONTINUED

The margin-creep mechanism

Manual decisions do not fail loudly. They fail through small, persistent errors. A 4% rating error on a single shipment is invisible. The same 4% error applied across a year of tenders, accessorials and surcharges is the difference between a profitable lane and a loss-making one. Survey respondents named data entry between systems, spreadsheets, portals and emails (25%) and shipment status updates (24%) as additional manual hotspots. Each of which compounds the same way.

“A 4% rating error on a single shipment is invisible. Applied across a year, it is the difference between a profitable lane and a loss-making one.”

FROM THE ANALYSIS • CHAPTER 02

WHAT TO LOOK FOR IN A SOLUTION

- ▶ Unified rate intelligence: a single source of truth for contract rates, dynamic rates, fuel, and accessorials, with auditable rules.
- ▶ Surcharge & accessorial automation: applies the right charges at the right time, every time without re-keying.
- ▶ Carrier-fit decisioning: recommends carriers based on lane history, service, capacity, and total landed cost, not just who is on the rolodex.
- ▶ Exception-only review: flags only the loads that need a human; lets the rest move through automatically.

BY THE NUMBERS

41%

say carrier and vendor selection is a highly manual

39%

say load coverage and shipment planning are manual

29%

say spot pricing and tendering decisions remain manual

CHAPTER 03 · WHY AI STALLS

Why AI investments stall: it's the plumbing, not the algorithm.

There is a temptation, especially in vendor literature, to frame the AI conversation around model sophistication. The data tells a different story. The largest single barrier to AI value, named by 12% of respondents, is the prevalence of disconnected systems, portals, spreadsheets, and customer- or vendor-specific workflows. The second is leadership misalignment (10%). The third is limited internal skills (9%).

Read together, these barriers describe an environment where AI is being deployed on top of a fragmented data layer, without a clear executive mandate, and without the in-house skills to maintain the result. The model is rarely the bottleneck. The plumbing is.

Disconnected systems and leadership misalignment are the top blockers to AI value

Barriers to realizing AI / automation value, % of respondents

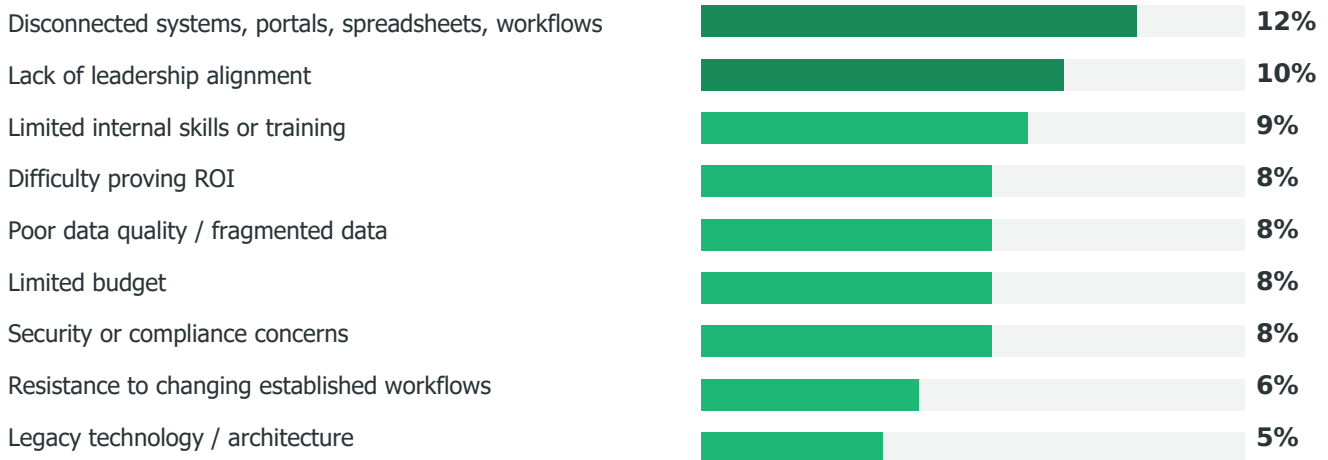


FIGURE 04 · BARRIERS TO REALIZING AI VALUE

CHAPTER 03 · CONTINUED

The integration tax.

When carrier selection lives in one system, contract rates live in a second, surcharges live in a third, and shipment status updates live in fourteen carrier portals, no AI engine, however sophisticated, can reason across them in real time. Each handoff introduces a manual step. Each manual step is a place where margin can leak. 8% of respondents named poor data quality and fragmented data as a barrier; another 8% cited difficulty proving ROI. These are downstream symptoms of the same upstream fragmentation.

READ THIS WAY

The top three barriers (disconnected systems, leadership alignment and skills) are organizational, not technical. Together, they explain why pilot projects rarely scale: the surrounding workflow has not changed, only the model has. AI value is unlocked by replacing fragmented decisioning workflows, not by bolting models onto them.

WHAT TO LOOK FOR IN A SOLUTION

- ▶ Workflow unification: a decisioning layer that spans rating, sourcing, tendering, and surcharge management instead of plugging into each silo.
- ▶ API-first connectivity: pulls from existing TMS, ERP, WMS, and carrier portals without forcing a rip-and-replace.
- ▶ Audit-ready logic: every AI-driven decision should be inspectable (which rate, which carrier, why, and what the alternative was).
- ▶ Operator-friendly: adoptable by ops teams without a data-science org behind it.

CHAPTER 04 • WHERE AI PAYS OFF

Where AI is already paying off in freight.

For the organizations that have moved past the pilot phase, the value is concrete and measurable. Better margin protection and transportation cost control is named by 12% of respondents as the top value driver. Faster quote, bid, procurement, and response turnaround is also at 12%. Improved pricing, rating, routing, and procurement consistency follows at 11%, alongside higher employee productivity (11%) and fewer errors, exceptions, and rework (11%).

Margin protection and decision speed lead the value drivers

Measurable value drivers reported by orgs using AI & automation

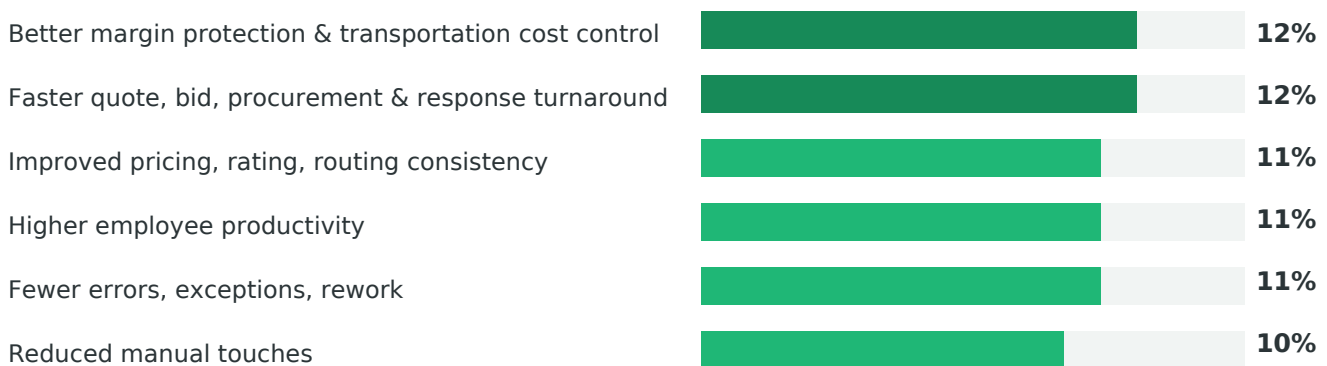


FIGURE 05 • MEASURABLE VALUE DRIVERS

Volume without headcount.

On the workforce side, 17% of respondents say AI and automation help them handle more volume without increasing headcount, the single most-cited workforce outcome. Another 17% say it has reduced overtime, temporary labor, or backlog burnout. 13% are redeploying people from low-value re-keying to higher-value customer work. The pattern is not labor reduction. It is labor leverage.

For ops leaders, the implication is direct: every percentage point of manual decisioning that is moved to an AI engine is a percentage point of capacity that returns to the team for exception handling, customer relationships, and continuous improvement.

CHAPTER 04 • CONTINUED

THE LABOR-LEVERAGE PATTERN

17%

handle more volume without adding headcount, the top workforce outcome

17%

say AI has reduced overtime, temporary labor, or backlog burnout

13%

are redeploying people from low-value re-keying to higher-value work

WHAT TO LOOK FOR IN A SOLUTION

- ▶ Faster quote-to-cash: automated rating, decisioning, and accessorial application that compresses the quote cycle from hours to seconds.
- ▶ Margin protection by default: every quote is priced with awareness of contract terms, surcharges, and lane economics.
- ▶ Consistency across teams and shifts: the same logic applies to a load tendered at 6 AM by the night desk and at 3 PM by the senior planner.
- ▶ Built for scale: capacity to handle volume growth without proportional headcount growth.

“The pattern is not labor reduction. It is labor leverage.”

FROM THE ANALYSIS • CHAPTER 04

CHAPTER 05 • THE MEASUREMENT GAP

The measurement gap is a leadership gap.

If the previous chapter is the good news, this is the cautionary one. Only 1% of logistics organizations report aggregating and communicating AI and automation value at the business or executive level. 29% regularly measure value across multiple use cases. The remaining 70% are at earlier stages of measurement maturity, measuring some use cases, running solutions in production without measuring at all, estimating value before rollout but never validating after, or simply piloting.

Only 1% of organizations report AI value at the executive level

Maturity of AI / automation value measurement, % of respondents

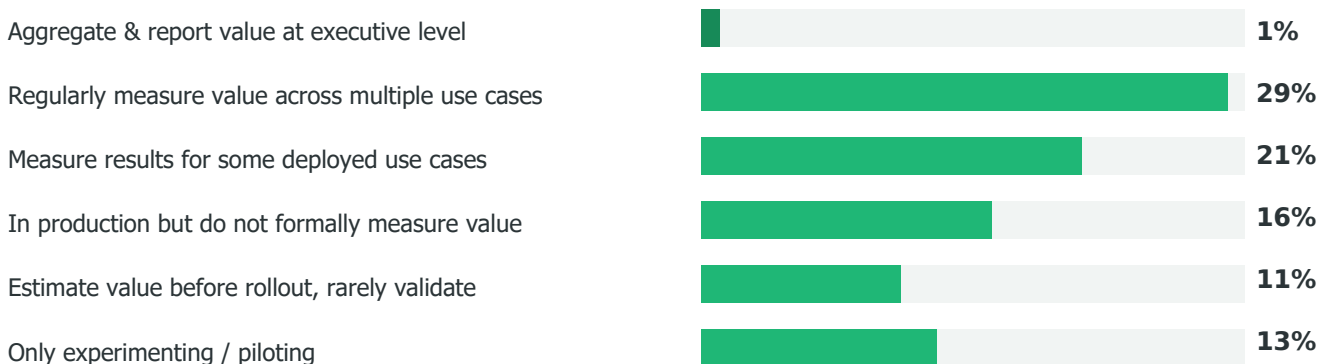


FIGURE 06 • MATURITY OF AI VALUE MEASUREMENT

Why this is operational, not just executive.

It is tempting to read the measurement gap as a CFO problem. It is not. When AI value is not measured, it is not protected. Pilots get cut in the next budget cycle. Workflows that were partially automated drift back to manual. The early margin gains are lost to the next quarter's organizational gravity. Operations leaders pay the price first.

CHAPTER 05 · CONTINUED

The 21% “still evaluating use cases” cohort flagged in the survey deserves particular attention. The risk is not that they pick the wrong use case (most freight workflows have a manual layer that could benefit from AI). The risk is that they pick a use case without a measurement framework, deploy it, and have nothing to show for it twelve months later.

“When AI value is not measured, it is not protected. Pilots get cut, and partially-automated workflows drift back to manual.”

FROM THE ANALYSIS · CHAPTER 05

WHAT TO LOOK FOR IN A SOLUTION

- ▶ Built-in value measurement: every automated decision logs the alternative it replaced and the margin or time impact.
- ▶ Operator-level dashboards: not a separate BI project; the value of automation is visible in the same screen the team uses to run the business.
- ▶ Executive-ready rollups: quarterly summaries that aggregate margin protected, quote turnaround, and exception rates without manual extraction.

THE MEASUREMENT MATURITY DIVIDE

1%

aggregate and report AI value
at the business level

29%

regularly measure value
across multiple AI use cases

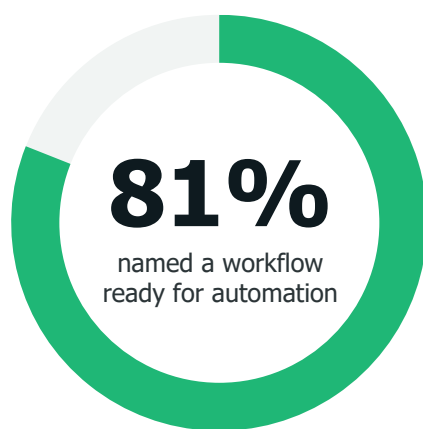
70%

are at earlier stages of
measurement maturity

CHAPTER 06 · THE PATH FORWARD

From manual to intelligent decisioning.

The strongest signal in the survey is a hopeful one. When asked whether there were workflows that could benefit from greater intelligence, automation or less manual intervention, 81% of respondents said yes. AI-driven workflow automation was the single most-named target, cited by 55% of those respondents. Supply-chain optimization (order processing, picking, fulfillment, routing) followed at 37%.



55% **AI-driven workflow automation**
Routing, route planning, decisioning

37% **Supply-chain optimization**
Order processing, picking, fulfillment

41% **Of positive responses**
came from shipping & distribution

FIGURE 07 · 81% NAMED A WORKFLOW READY FOR AI AUTOMATION

Where to start.

For logistics and operations leaders, the data points to a sequence rather than a single bet. The highest-value workflows to automate first are the ones where manual effort is concentrated and where errors compound directly into margin: rating and surcharge decisioning, carrier selection, and load tendering. These are the workflows where 41%, 39%, and 29% of organizations still rely on manual effort, and where AI-driven decisioning can pay back fastest.

CHAPTER 06 · CONTINUED

Three principles separate the leaders from the stalled.

01

Treat workflow unification as the first deliverable, not the algorithm.

Disconnected systems are the #1 barrier; the solution profile must close that gap first.

02

Pick workflows where margin is made or lost.

Rating, surcharge management, and carrier decisioning produce margin every day; back-office automation produces savings once.

03

Measure from day one.

Every automated decision should produce a value record. Without it, the next budget cycle takes the program down.

BOTTOM LINE

The freight industry is not short on AI ambition. 81% of respondents named a workflow they want to automate. What the industry is short on is unified decisioning that sits across rating, surcharge management, carrier selection, and tendering, the workflows where margin is actually made.

The organizations that close that gap first will protect margin, scale volume without scaling headcount, and turn measurement maturity into a competitive moat.

METHODOLOGY & SOURCES

About this benchmark.

This report is based on a survey of 100 respondents from freight, transportation, warehousing, and logistics organizations conducted in 2026. Respondents include shippers (64%), freight forwarders (13%), freight brokers (8%) and third-party logistics providers (7%). Roles span transportation and logistics managers (41%), operations professionals (34%), and procurement, planning, and executive functions.

Quantitative findings are reported as a percentage of respondents selecting a given option. Qualitative themes (the workflow-automation demand finding in particular) were derived from open-ended responses and coded for sentiment and target workflow.

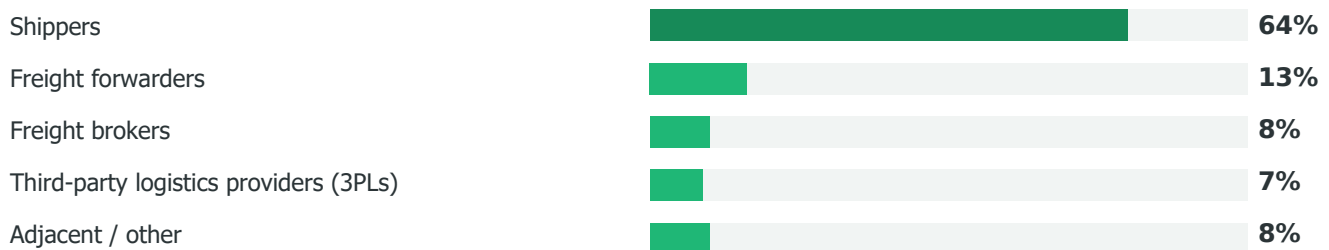
Statistical tests applied where relevant include chi-square tests for association between industry function and adoption maturity ($p = 0.296$) and between company type and adoption pattern ($p = 0.362$). Where group differences are reported, segment sizes are noted.

All findings represent the surveyed sample. Readers should validate fit with their own operational context before acting.

RESPONDENT MIX

Respondents by organization type

% of $n=100$



Respondents by role

% of $n=100$



Margin is **made** in forward-looking decisions. **Not in dashboards.**

G2Mint builds the decisioning layer for modern freight operations - unifying rating, AI agents/plugins, and carrier management in a single, audit-ready engine.