



HIGH-STAKES FREIGHT BROKERAGE: RISK & ACCOUNTABILITY

How the Pursuit of Low-Cost
Brokerage Created a Reliability Crisis
in High-Stakes Freight

WERNER



FREIGHTWAVES



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OVERVIEW

Over the past decade, the freight brokerage industry has undergone a dramatic structural shift. Digital-first platforms and automated matching engines promised a faster, cheaper way to move freight, and in many respects they delivered. Load boards proliferated, carrier tendering accelerated, and transaction costs dropped. In the race to drive down the cost per load, however, the industry introduced a lack of accountability that is now costing shippers more than they ever saved on rates.

To quantify the scope of this problem, FreightWaves Research and Werner® partnered to survey freight professionals responsible for moving high-value, high-stakes freight, including the manufacturing components, temperature-controlled shipments, and high-end retail goods.

Based on the results, shippers overwhelmingly understand low cost often comes with higher risk. They are experiencing frequent compliance failures, operating with inadequate visibility, absorbing significant financial losses from carrier-

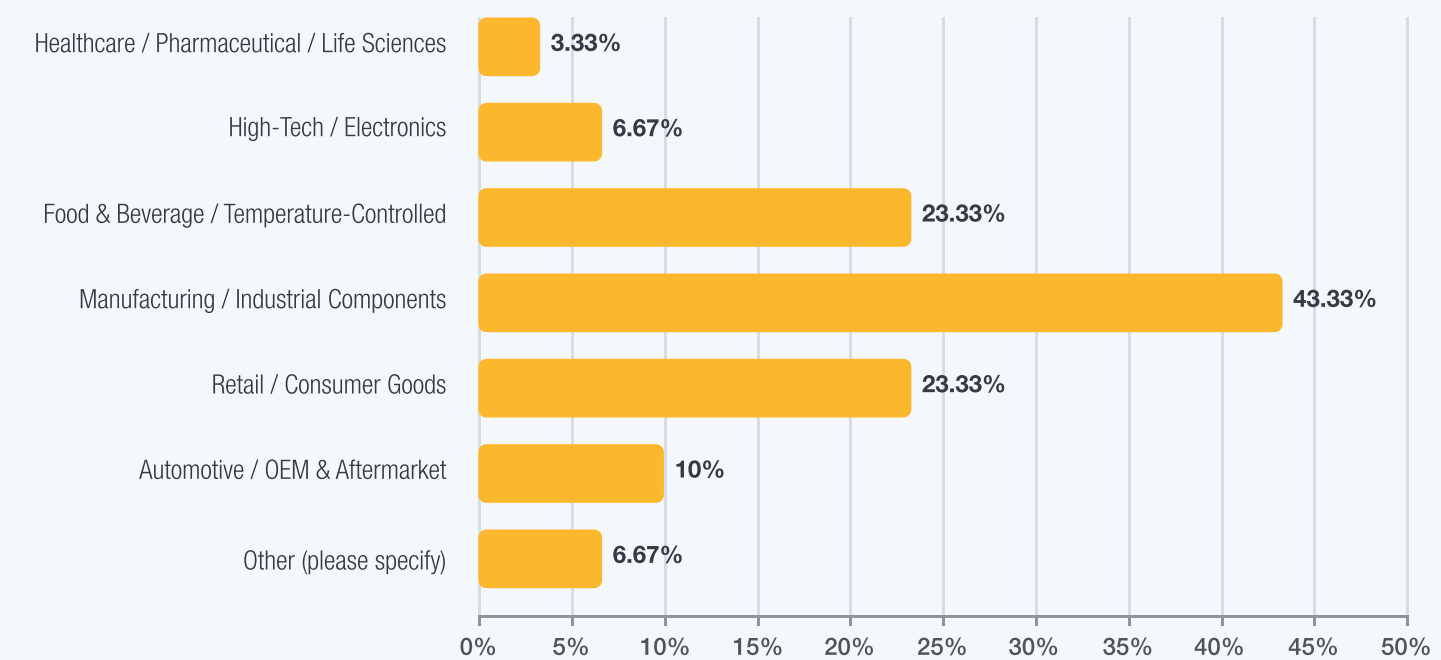
caused delays, and expressing deep dissatisfaction with the carrier networks their brokerages provide.

They are willing to pay for human contact and accountability.

Optimized for speed and cost, the current brokerage model is structurally misaligned with shippers’ needs. Particularly in high-stakes sectors, failure carries real financial and operational consequences. Protecting the supply chain will require an accountability-first brokerage model in the coming years.

The survey’s respondent base is anchored in industries where freight failures can create operational crises. Manufacturing and industrial components represent the largest segment at 43.33%, followed by food and beverage/temperature-controlled freight and retail/consumer goods, each at 23.33%. Automotive, healthcare, and high-tech round out the remainder.

Q1 - Which of the following best describes the primary type of freight your company ships? (Select all that apply)



These are largely companies moving components into just-in-time production environments, perishable goods under regulatory chain-of-custody requirements, and retail inventory against firm delivery windows. The cost of failure in these freight profiles far exceeds any savings achieved with a lower rate.

Expenses associated with incidents such as carrier-caused delays or repeated food and beverage compliance failures are quantifiable business losses that compound quickly.

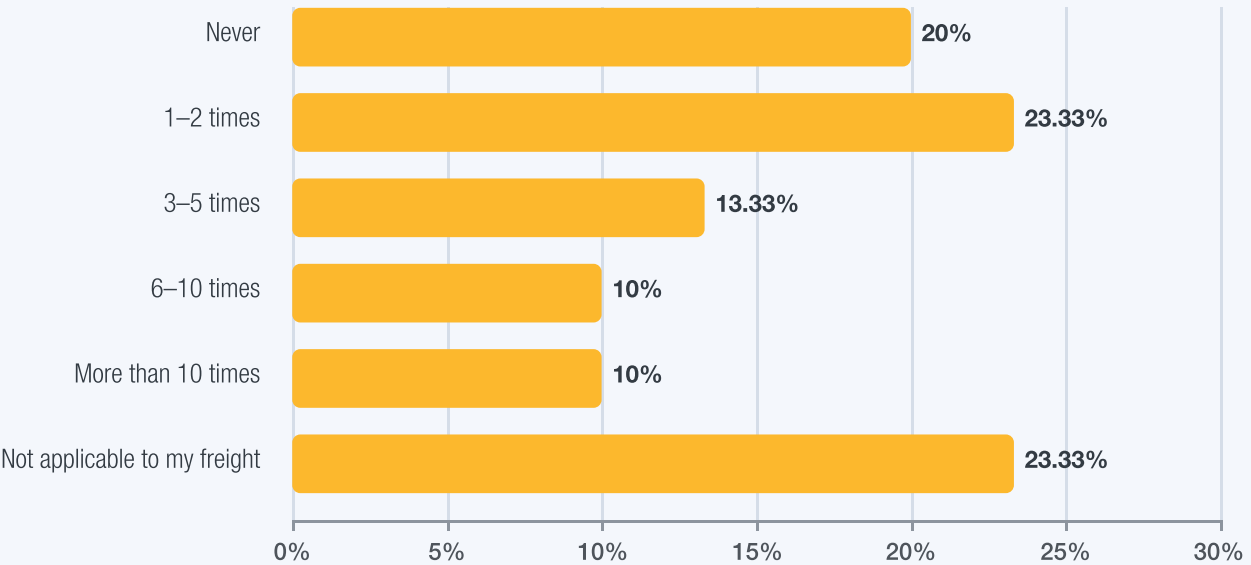


THE HIGH COST OF “LOW-COST” BROKERAGE

The conventional brokerage value proposition centers on access to capacity at competitive rates. The real cost equation extends far beyond the line-haul rate when it comes to high-stakes freight. There is a significant gap between what shippers can save on freight spend and what they lose when carriers fail.

A majority of respondents experienced at least one third-party carrier failure in the past 12 months. A combined 20% reported six or more failures, with 10% experiencing more than ten incidents. Those numbers suggest systemic breakdowns in carrier vetting and oversight.

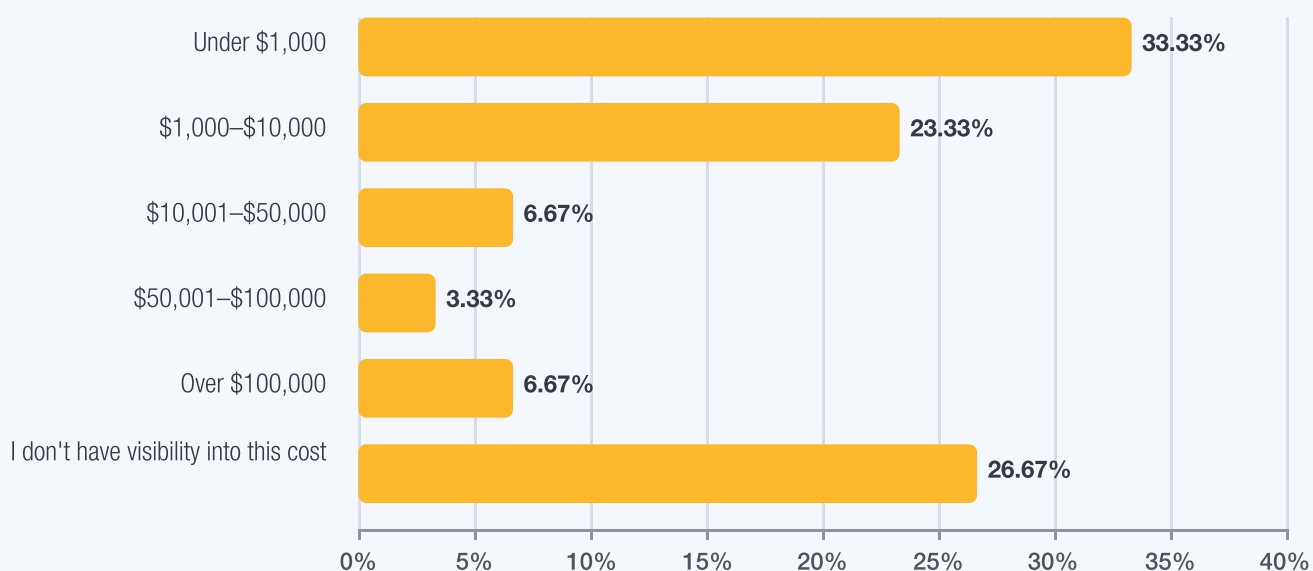
Q2 - In the last 12 months, how frequently has a third-party carrier failed to meet your compliance, regulatory, or temperature-control requirements (e.g., GDP, cold chain, chain of custody documentation)?



When those failures translate into delays, the financial consequences escalate rapidly. While roughly a third of respondents estimate the business impact of a single hour of carrier-caused delay at under \$1,000, the distribution reveals significant high-end exposure: 6.67% report impacts exceeding \$100,000 per hour, and another 3.33% fall in the \$50,001–\$100,000 range.

These figures are consistent with broader industry data regarding just-in-time production lines. Research from Siemens and Aberdeen places average unplanned manufacturing downtime costs at roughly \$260,000 per hour across all sectors, with automotive plants reaching \$2.3 million per hour. When a carrier failure is the triggering event, the brokerage’s rate savings become irrelevant against losses of that magnitude.

Q6 - For your operation, what is the approximate business impact of a single hour of delay caused by a carrier failure (e.g., assembly line stoppage, missed retail delivery window, spoiled perishable product)?



Shippers are experiencing repeated carrier failures through their brokerages (Q2) while simultaneously facing per-hour delay costs that can reach six figures (Q6). Saving \$200 per load on a rate can come with a disproportionately negative ROI if it exposes a shipper to a delay that costs tens of thousands of dollars.

The math gets worse with every additional failure, and these failures are not exceedingly rare.

The current brokerage model is optimized for transaction cost, and it systematically externalizes the cost of failure onto the shipper. The rate can look competitive on paper, but when carrier failures, compliance incidents, and delay-driven losses are factored in, the cost of choosing the wrong broker or carrier can be catastrophic.



THE VISIBILITY VACUUM

If carrier failures are the disease, visibility gaps are the mechanism by which they metastasize. The survey's findings on shipment visibility paint a picture of an industry where shippers routinely lose sight of their freight at exactly the moments when oversight matters most.

When asked to rank their top concerns about moving high-value freight through a non-asset brokerage, respondents placed lack of real-time visibility and tracking at the top, with a weighted average of 2.35. Cargo theft and security breaches (2.58) and carrier service standard failures (2.62) followed closely.

Q3 Which of the following concerns you most when moving high-value or high-stakes freight through a non-asset brokerage?

#1

Lack of real-time visibility and tracking

Weighted avg rank: 2.35

#2

Cargo theft or security breaches

Weighted avg rank: 2.58

#3

Carrier not meeting safety or service standards

Weighted avg rank: 2.62

#4

Insufficient or misrepresented insurance coverage

Weighted avg rank: 3.42

#5

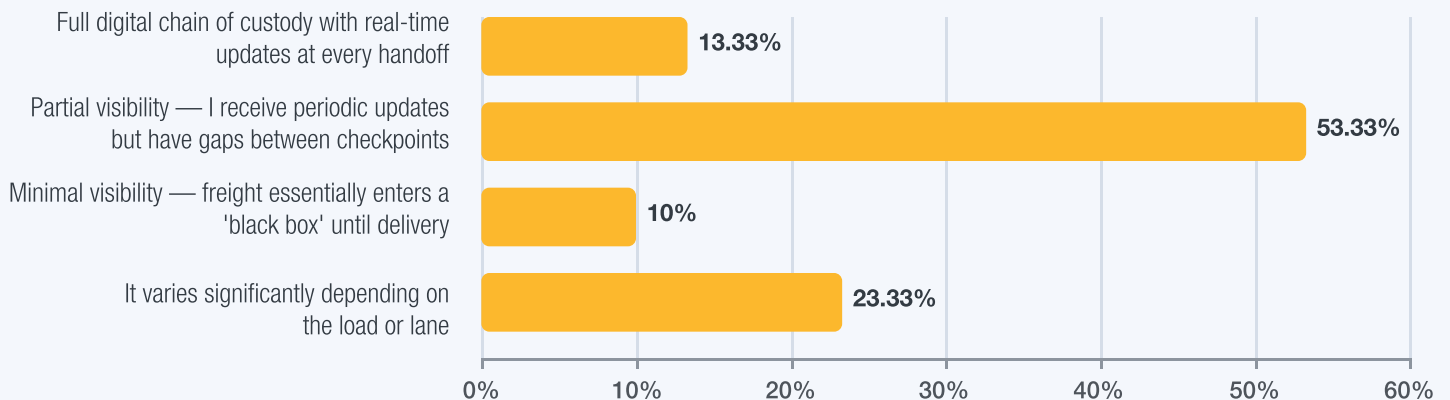
Inability to verify carrier credentials in real time

Weighted avg rank: 4.04

The concern is well-founded by the data on actual visibility performance. More than half of respondents (53.33%) describe their current brokerage visibility as partial, with gaps between checkpoints. Another 10% say freight enters a “black box” until

delivery. And 23.33% report that visibility varies depending on the load or lane, which is its own form of unreliability. Only 13.33% report full digital chain of custody with real-time updates at every handoff.

Q4 How would you describe the level of shipment visibility your current brokerage provider delivers once freight is tendered to a third-party carrier?

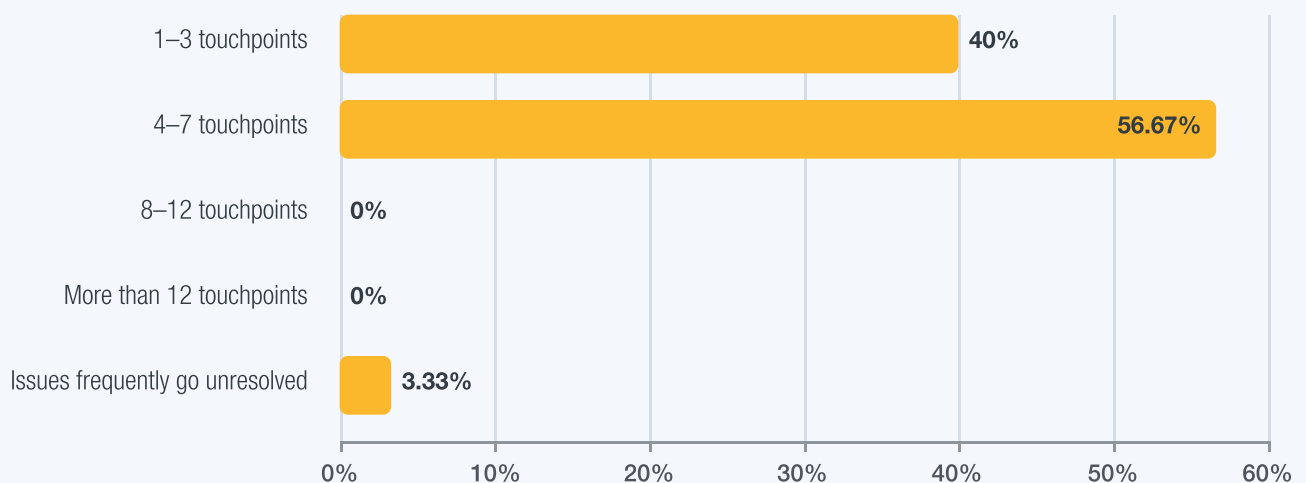


The visibility problem is particularly acute in the current threat environment. Cargo theft losses surged to an estimated \$725 million in 2025, a 60% increase from 2024, according to Verisk CargoNet analysis. Confirmed theft incidents rose 18% year-over-year, and criminal enterprises are increasingly targeting high-value shipments through sophisticated deception tactics including fictitious pickups and identity fraud. The FBI issued a public service announcement in April 2026 warning that cyber threat actors are impersonating legitimate businesses to hijack freight and reroute deliveries. In this environment, a brokerage that delivers partial visibility with gaps between checkpoints is

leaving shippers exposed to threats that are becoming more aggressive and more costly every year.

The visibility gap also constrains shippers' ability to intervene when exceptions occur. The survey found that 56.67% of respondents require 4–7 manual touchpoints (calls, emails, escalations) to resolve a single service exception, and 3.33% say issues frequently go unresolved entirely. Without real-time visibility, shippers can't detect problems early enough to mitigate them, which often turns recoverable situations into costly failures.

Q5 When a service exception occurs (late delivery, damaged freight, compliance issue), how many manual touchpoints (calls, emails, escalations) does it typically take to reach resolution?



THE HUMAN LINK COMPETITIVE ADVANTAGE

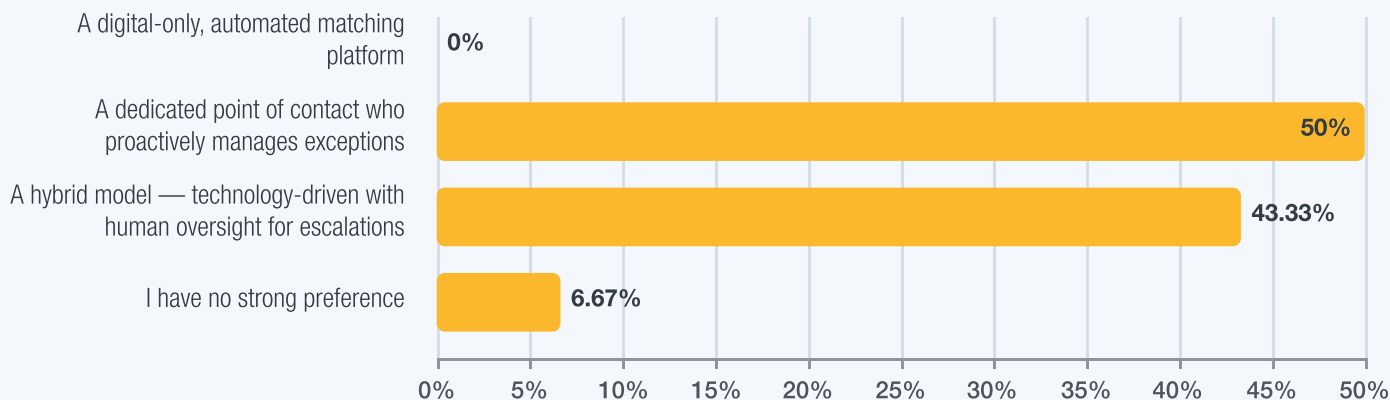
While automation and digital platforms are undoubtedly helpful, the survey results are clear that technology alone is not sufficient to manage high-stakes freight.

When asked which model they trust more to protect freight during market disruptions (which would include things like weather events, capacity crunches, and regulatory changes),

not a single respondent selected “a digital-only, automated matching platform.”

Half chose a dedicated human point of contact who proactively manages exceptions, and 43.33% preferred a hybrid model combining technology with human oversight. Only 6.67% expressed no preference.

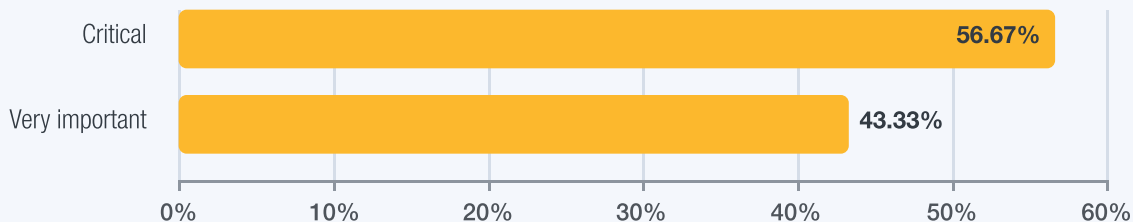
Q8 When a market disruption occurs (weather event, capacity crunch, regulatory change), which model do you trust more to protect your freight?



The industry has invested billions in digital freight platforms over the past decade. The complete rejection of the digital-only model clearly doesn't mean shippers reject technology-driven efficiency, but it reveals that when conditions deteriorate and the stakes are highest, shippers want a human being who knows their freight, understands the situation, and can exercise the judgment that algorithms cannot.

The companion question on customer service importance reinforces this. Every single respondent rated the quality of customer service and direct human interaction as either "critical" (56.67%) or "very important" (43.33%) when selecting a brokerage partner.

Q9 How important is the quality of customer service and direct human interaction (e.g., a named account representative, live support during transit, proactive issue communication) when you select a brokerage partner?



Technology's role in high-stakes freight is to augment human capability, not replace it. The most effective model uses automation to handle the predictable tasks while reserving human expertise for the exceptions. Disruption response, compliance oversight, proactive communication, and the relationship-level judgment that determines whether a problem gets solved or gets worse all still require expert intervention.

In high-stakes freight, the human element remains a competitive advantage to be invested in. Fifty-seven percent of exception resolutions require 4–7 manual touchpoints (Q5), meaning human judgment and communication remain central to how problems actually get solved.

The competitive advantage lies not in choosing between technology and people, but in deploying each where it creates the most value. Technology can be leveraged to handle tasks such as carrier sourcing, load optimization, tracking data aggregation, compliance documentation automation, and pattern recognition across network performance data.

The brokerages that will win high-stakes freight over the next several years are the ones that build technology platforms sophisticated enough to free their people from administrative tasks, so those people can focus entirely on the high-judgment, high-stakes resolutions.

THE CARRIER NETWORK CRISIS

The survey included a standard Net Promoter Score question asking respondents how likely they would be to recommend the carriers in their broker's network to a friend or colleague. The result: a score of -17.

In NPS methodology, a negative score means detractors outnumber promoters. Here, 30% of respondents are detractors, 56.67% are passives, and only 13.33% are promoters. This is not a score that reflects a few bad experiences amid general satisfaction. It represents a market where the majority of shippers have no enthusiasm for the carrier networks their brokerages deliver, and nearly a third are actively dissatisfied.

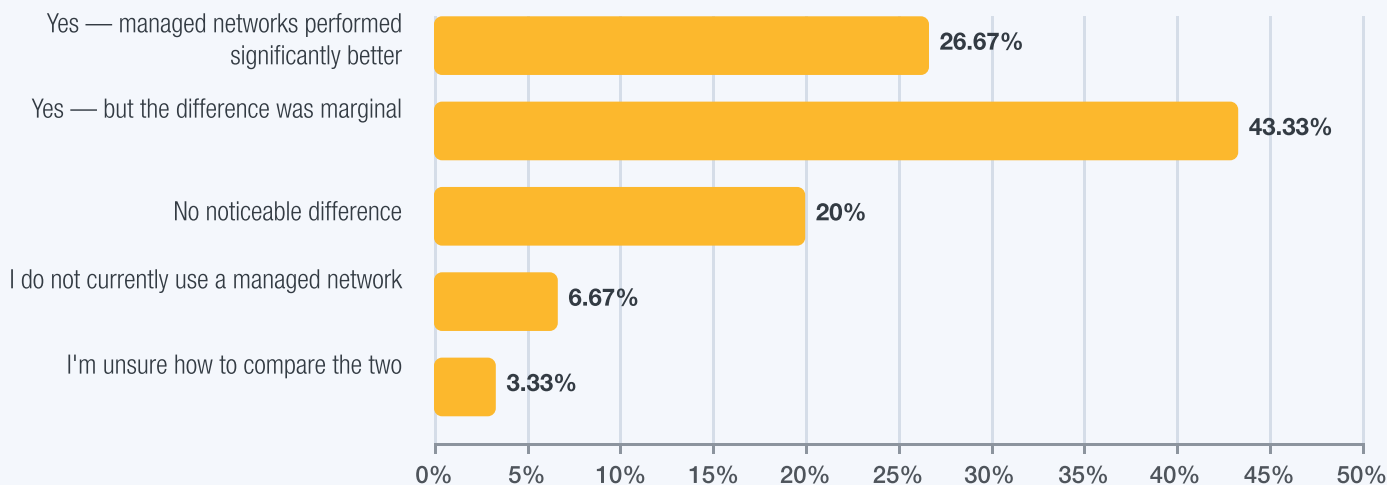
A -17 NPS on brokerage carrier networks should function as an industry alarm bell. Shippers are rating their brokerage's ability to curate, vet, and manage a reliable carrier pool. When the majority of shippers are at best indifferent and at worst hostile toward the carrier quality their brokerage delivers, it signals a

fundamental misalignment between what shippers need and what they feel the prevailing model provides.

The massive passive bloc (56.67%) is arguably as concerning as the detractor group. In NPS terms, passives are simply not dissatisfied enough to leave. They have accepted the status quo, likely because they don't believe a meaningfully better option exists.

Managed carrier networks, which are supposed to act as curated pools of vetted carriers that provide higher service quality than the open spot market, have gained significant traction in recent years. The survey results are mixed on whether managed networks are delivering on that promise. A combined 70% of respondents report that managed networks outperformed the spot market, but only 26.67% say the difference was significant, while 43.33% describe it as marginal. Another 20% see no difference at all.

Q11 In the past 12 months, have you experienced a measurable difference in on-time performance, cargo claims, or service quality between loads moved through a managed/curated carrier network versus loads placed on the open spot market?



These results suggest many “managed networks” are not delivering the differentiated performance their positioning implies. The managed network label may be doing more marketing work than operational work.

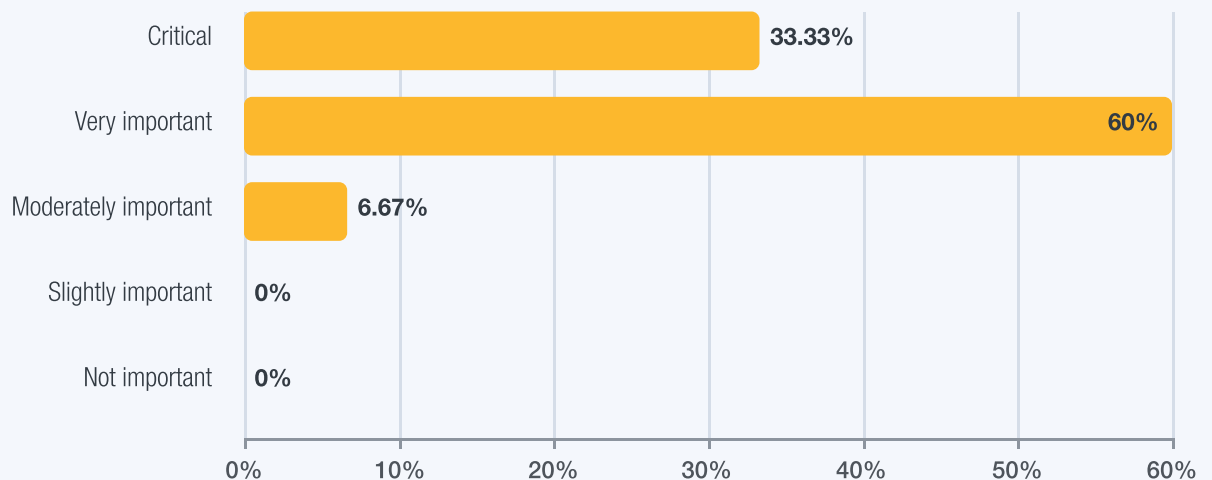
The problem lies in how many managed networks are constructed. A static list of pre-qualified carriers, vetted once and then left to operate without ongoing performance monitoring, is a managed network in name only. It provides a baseline of credentialing without the dynamic oversight that creates real performance separation.

True managed network performance requires continuous,

real-time performance measurement (on-time rates, compliance records, exception frequency, and resolution speed tracked at the load level, not the annual review level). It requires active curation wherein carriers that underperform are removed and replacements are sourced based on current data rather than historical relationships. It requires accountability mechanisms so the network actually improves over time rather than degrading toward the mean.

It’s unsurprising that 93.33% of respondents rate the ability to scale capacity without sacrificing vetting standards as “critical” or “very important.” Shippers want to rely on a network that maintains its standards under pressure.

Q10 How important is it that your brokerage partner can reliably scale carrier capacity to meet demand fluctuations without sacrificing vetting standards or service quality?





DEFINING THE ACCOUNTABILITY PREMIUM

26.67% of respondents do not have visibility into what a single hour of carrier-caused delay costs their operation. This quantification gap has cascading consequences. When shippers can't calculate the cost of failure, they can't properly evaluate the ROI of investing in higher-quality brokerage services. They default to comparing rates because rates are the number they can see, while the cost of the unreliability embedded in those rates remains invisible. This dynamic systematically undervalues reliability and overweights price in carrier selection.

The framework for closing this gap is straightforward, even if the calculation varies by industry and operation. The core components of a delay cost estimate include idle labor (hourly wages for workers who can't produce while waiting for delayed freight), production penalties (contractual fines, line-down charges from OEM customers, or spoilage costs for perishable products), downstream customer impact (missed retail delivery windows, chargebacks, expedited reshipping costs), and administrative burden (the staff hours consumed by exception management, which the survey shows averages 4–7 touchpoints per incident).

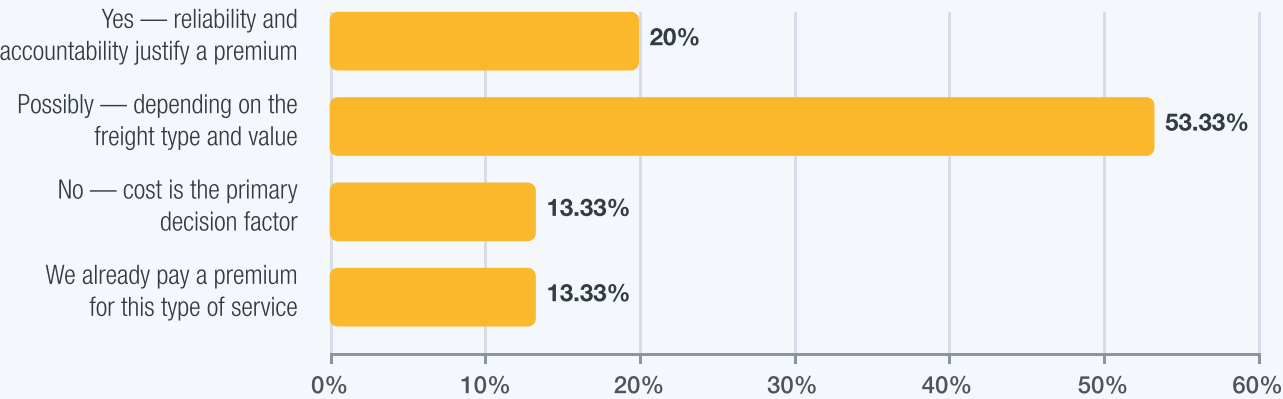
A manufacturing shipper running two shifts with 50 line workers

at \$25 per hour incurs \$2,500 in idle labor alone for every hour a carrier-caused delay shuts down production, and that's before factoring in production penalties, expedited reshipping, or customer relationship damage. The true per-hour cost can quickly reach five or six figures for shippers with OEM contractual penalties or retail chargeback exposure.

Once a shipper quantifies this exposure, the economics of an accountability-focused brokerage become clearer. A modest per-load premium for guaranteed service standards, verified carrier credentials, and proactive disruption management looks very different when measured against even a single avoided delay event.

The survey's final question tests whether shippers would pay for what the rest of the data shows they need, and the answer is decisively yes. When asked whether they would pay a modest premium for brokerage services guaranteeing asset-level accountability, a digital chain of custody, and a dedicated human point of contact, 86.66% of respondents answered affirmatively or conditionally: 20% said yes outright, 53.33% said possibly depending on freight type and value, and 13.33% said they already pay for this level of service. Only 13.33% cited cost as the primary decision factor.

Q12 Would your company be willing to pay a modest premium for brokerage services that guarantee asset-level accountability, a digital chain of custody, and a dedicated human point of contact – versus the lowest-cost option on an open load board?



Shippers need to understand what they're buying. The term "digital chain of custody" is vague enough to include everything from a GPS dot on a map to verified driver identity at pickup, confirmed against the dispatched assignment, or even geofenced arrival and departure timestamps that create an auditable record of every handoff. For temperature-sensitive freight, it might mean automated logging that produces regulatory-grade documentation without relying on manual driver entries. In the best case, a proper chain of custody includes a named human point of contact who has both the authority and the technology access to intervene in real time when exceptions occur.

This is the shift from "tracking" to "evidence-based shipping." Every load should generate a verifiable, time-stamped record of custody, condition, and performance that protects the shipper legally, operationally, and financially.

For the 53.33% who said "possibly," the conversion is less about price sensitivity and more about demonstrating that the premium buys a fundamentally different level of protection than what they're getting today.



ACTIONABLE STEPS

The data from this survey converges on a clear set of priorities for shippers with high-value, high-stakes freight.

Quantify your delay exposure.

The 27% of respondents who can't calculate the cost of a single hour of carrier-caused delay are making brokerage decisions without understanding the full cost equation. Map idle labor costs, production penalties, customer chargebacks, and administrative burden per incident. This number is the foundation for evaluating whether an accountability-focused brokerage partner justifies a premium over the lowest-rate option.

Audit your visibility reality.

If your brokerage delivers partial visibility with gaps between checkpoints as it does for 53% of survey respondents, you are operating with a structural blind spot that limits your ability to intervene when exceptions occur. Demand a clear answer from your brokerage: what specific technology provides load-level tracking at every handoff, and what is the protocol when tracking data goes dark?

Evaluate your carrier network's actual performance, not its description.

Seventy percent of respondents see some managed network advantage, but only 27% see a significant one. Ask for load-level performance data such as on-time percentages, exception rates, compliance records, and claims history, and then compare it to your spot market outcomes. If the difference is marginal, your managed network may not be managed in any meaningful sense.

Redefine what you're buying from a brokerage.

There exists overwhelming demand for human-centric service models, accountability mechanisms, and evidence-based custody documentation. If your current brokerage conversation centers on rate per mile, you're negotiating the wrong variable. The shippers who best protect their supply chains are negotiating for verified carrier credentials, guaranteed service standards, named human points of contact, and contractual accountability for performance.

Test the premium.

With 87% of respondents open to paying more for accountability, the market has already answered the willingness question. The remaining question is whether the premium delivers. Run a controlled comparison: route a subset of your high-value freight through an accountability-focused partner and measure total cost of relationship (rate plus exceptions plus delays plus administrative burden) against your current model. The premium likely pays for itself.



ABOUT WERNER

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multi-modal solutions include Dedicated, Premium Services, Intermodal, Final Mile, Cross-Border Mexico and more. Werner's strength in transportation and logistics enhances the businesses of our customers, ensuring their supply chains operate smoothly and efficiently.

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