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LOGISTICS MARKET REPORT

GLOBAL MARKET | OCEAN FREIGHT

MAJOR CARRIER TESTS EXPANDED SUEZ CANAL ROUTING WITH FULL INDIA–U.S. EAST COAST LOOP

A gradual return of container shipping through the Red Sea is beginning to take shape as CMA CGM announces a structural change to one of its east–west services. The carrier confirmed that its INDAMEX service, linking India and Pakistan with the U.S. East Coast, will begin transiting the Suez Canal on both eastbound and westbound voyages starting mid-January 2026, marking a notable operational shift after extended diversions around the Cape of Good Hope. Routing the service through the Suez Canal significantly shortens overall voyage duration, allowing the carrier to redesign the service rotation and reduce the number of vessels required to maintain weekly frequency. As Xeneta Chief Analyst Peter Sand noted, “We are still some way from a largescale return of container shipping to the Red Sea, but CMA CGM’s announcement of a full east–west loop via Suez is certainly a notable step in the right direction” (Sand, as cited in Hennessey, 2025). Sand cautioned that security assessments remain central to carrier decision-making, stressing that risk evaluations focus on both capability and intent of potential threats. As traffic volumes increase, exposure naturally rises, reinforcing the need for sustained stability before broader industry adoption occurs. Other global carriers have yet to commit to similar timelines, underscoring the uneven pace of operational normalization across the industry. However, the announcement from CMA CGM does provide an early indicator of how carriers may recalibrate services as operational confidence gradually returns.

Source: Hennessey, P. (2025, December 5). *Return of container ships to Red Sea edges closer: major carrier announces new full-loop service via Suez Canal.* Xeneta. https://www.xeneta.com/news/return-of-container-ships-to-red-sea-edges-closer-major-carrier-announces-new-full-loop-service-via-suez-canal

CONTAINER CHARTER MARKET SHOWS YEAR-END STABILITY AS FLEET EXPANSION APPROACHES

As 2025 draws to a close, container shipping lines and tonnage providers have accelerated newbuilding commitments, underscoring continued confidence in long-term fleet expansion despite broader market uncertainties. Industry analysts describe a clear pre-holiday rush to secure shipyard slots before year-end, pushing the global orderbook to historic levels. This surge in ordering reflects a decisive shift toward long-term fleet optimization. Carriers appear focused on securing future capacity, improving operational efficiency, and ensuring flexibility across multiple trade lanes. The consultancy further emphasized the continued strength of Asian shipbuilding, noting that "China's shipyards still secured the bulk of the contracts this year," reinforcing their central role in global fleet expansion (Koo, 2025). These new vessels will likely shape service patterns, alliance strategies, and port infrastructure planning well beyond the current market cycle.

Source: Koo, A. (2025, December 19). *Pre-holiday rush for newbuild box ships and a record orderbook*. The Loadstar.
https://theloadstar.com/pre-holiday-rush-for-newbuild-box-ships-and-a-record-or

GLOBAL MARKET | OCEAN FREIGHT

EU–MERCOSUR TRADE TALKS FACE DELAY AS FRANCE PUSHES FOR AGRICULTURAL SAFEGUARDS

GLOBAL MARKET | OCEAN FREIGHT

Momentum toward finalizing the long-negotiated European Union–Mercosur trade agreement has slowed after France formally requested that the European Commission delay the current timetable for approval. According to a statement from the French prime minister's office, Paris believes the conditions are not yet suitable for member states to vote on the agreement. As the government explained, France is seeking more time "*to continue the work and obtain the legitimate protection measures for our European agriculture*" (Presse, 2025). The EU–Mercosur deal aims to deepen trade integration between Europe and South America by easing access for European manufactured goods—such as automobiles, machinery, and wine—while expanding entry for agricultural products from Argentina, Brazil, Paraguay, and Uruguay. If implemented, the agreement would establish one of the world's largest integrated trade areas, covering a combined population of more than 700 million people.

Source: Presse, F. (2025, December 14). *France asks the European Union to postpone deadlines for signing an agreement with Mercosur.* Globo.
https://g1.globo.com/economia/noticia/2025/12/14/franca-pede-a-uniao-europeia-que-adie-tramite-de-acordo-com-mercosul.ghtml

CONTAINER CHARTER MARKET SHOWS YEAR-END STABILITY AS FLEET EXPANSION APPROACHES

GLOBAL MARKET | OCEAN FREIGHT

The global container ship chartering market closed 2025 on a notably steady footing, demonstrating resilience even as broader freight markets faced mounting headwinds. According to *MSI's December Horizon Monthly Containership Report*, charter benchmarks across most vessel sizes held largely stable toward year end, signaling that effective supply discipline continued to underpin the market.Feeder vessels continued to demonstrate underlying strength, particularly in Asia-focused trades. MSI highlighted a notable structural shift within intra-Asian shipping, where significantly larger container ships were redeployed from long-haul routes into regional services. The report emphasizes that limited feeder fleet growth in early 2026 should allow "the feeder charter market to remain very healthy in the short term" (MundoMaritimo, 2025).

Source: MundoMaritimo. (2025, December 22). *Container ship chartering market closes 2025 with solid rates across most sizes.* MundoMaritimo. *https://www.mundomaritimo.cl/noticias/mercado-de-fletamento-de-portaconten cierra-2025-con-tarifas-solidas-en-la-mayoria-de-los-tamanos*

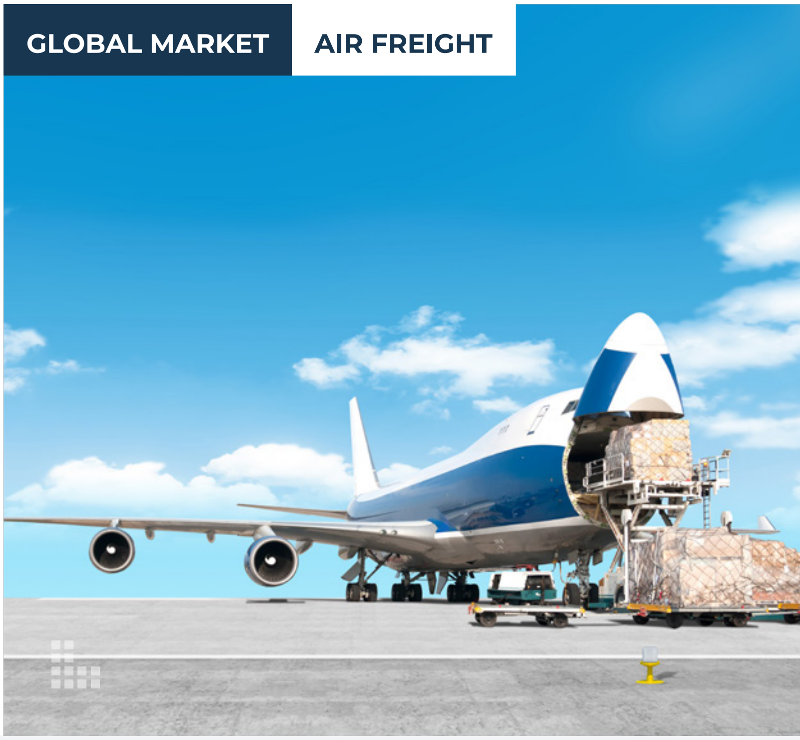
AIR CARGO MARKET ENDS 2025 ON STABLE FOOTING AS CARRIERS ADJUST CAPACITY

GLOBAL MARKET | AIR FREIGHT

Global air cargo markets are ending the traditional peak season with steady momentum, supported by resilient demand and disciplined capacity management. Industry data points to broadly positive conditions, even as some trade lanes begin to stabilize. As reported, market indicators suggest "*another broadly positive year for the industry, supported by robust demand and capacity constraints,*" (Lennane, 2025) despite ongoing trade and tariff uncertainties. While regional performance remains uneven, carriers continue to fine-tune capacity to align with shifting market dynamics as the year draws to a close.

Source: Lennane, A. (2025, December 16). *Air cargo rates hold firm into year-end and carriers fine-tune capacity.* The Loadstar. *https://theloadstar.com/air-cargo-rates-hold-firm-into-year-end-and-carriers-fine-tune-capacity/*

IATA 2026 AIR CARGO OUTLOOK PREDICTS CONTINUED GROWTH AND RESILIENCE



Looking ahead to 2026, the global air cargo sector is expected to deliver moderate but resilient growth as supply chains stabilize and carriers continue to manage capacity carefully. According to the International Air Transport Association (IATA), air cargo volumes are forecast to increase by around 2.4% year on year, reflecting continued demand for time-critical and high-value goods despite slower global trade expansion. The outlook highlights that air freight remains structurally important to global logistics networks, particularly during periods of economic and geopolitical uncertainty. IATA notes that air cargo has consistently acted as "a critical enabler" for global supply chains, supporting industries reliant on speed, reliability, and resilience (IATA, 2025). While yield pressure and uneven regional performance persist, disciplined capacity deployment and ongoing e-commerce demand are expected to underpin market stability. Overall, the 2026 outlook suggests air cargo will remain a vital pillar of global trade as the industry adapts to a more normalized growth environment.

Source: IATA. (2025). *Global Outlook for Air Transport – December 2025.* International Air Transport Association.
https://www.iata.org/en/publications/economics/reports/global-outlook-for-air-transport-december-2025/

MULTIPURPOSE SHIPPING MARKET SHOWS STEADY FOOTING AS 2025 DRAWS TO A CLOSE

The global multipurpose and heavy-lift shipping segment continues to demonstrate unusual stability as the industry approaches year-end, according to Toepfer Transport's latest monthly market assessment. This stability reflects the sector's diversified cargo base, which spans project cargo, industrial equipment, and heavy-lift movements tied to infrastructure and energy investments. "Toepfer said fleet utilization remains at a satisfactory level, and the stable market indicates no likelihood of a year-end rally or decline" (Kershaw, 2025). As 2026 approaches, the absence of major market shocks positions the segment as a reliable option for shippers seeking predictability amid ongoing global trade uncertainty.

Source: Kershaw, D. (2025, December 4). *Toepfer Transport's monthly multipurpose shipping rate update.* Heavy Lift & Project Forwarding International.
https://www.heavyliftpfi.com/sectors/toepfer-transports-monthly-multipurpose-shipping-rate-update/21174.article

SHIFTING TRADE POLICIES KEEP US PORT GROWTH PROJECTIONS MODEST FOR 2026

U.S. ports are preparing for another challenging year in 2026 as shifting tariff policies and persistent trade uncertainty continue to reshape shipper behavior. According to S&P Global Ratings, "The recently negotiated truce in the US-China trade conflict provides a measure of certainty until that agreement expires" (Angell, 2025). Yet elevated tariffs on China and other major partners still create a challenging environment for containerized import growth. Industry indicators reinforce this cautious outlook. Industry groups reinforce this cautious view. The National Retail Federation projects notable year-over-year declines in early 2026, while Moody's credit agency expects volumes to remain flat or slightly negative compared with 2025. For logistics providers, cargo owners, and port authorities, the signal is clear: 2026 will demand heightened adaptability and scenario planning. A rebound is expected in 2027, but navigating the coming year will require close monitoring of political, economic, and regulatory shifts that continue to reshape global trade flows.

Source: Angell, M. (2025, December 10). *US container volumes set for weak 2026 amid ongoing trade uncertainty*. Journal of Commerce. *https://www.joc.com/article/us-container-volumes-set-for-weak-2026-amid-ongoing-trade-uncertainty-6132279*

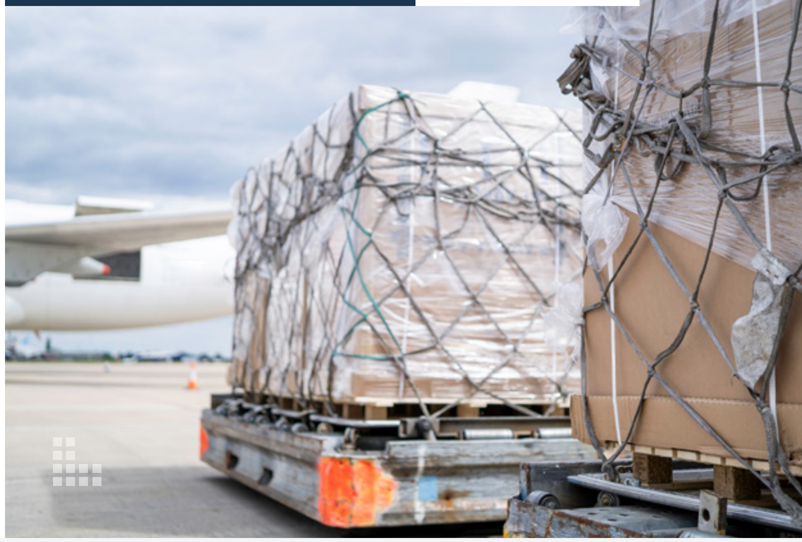
US RECLASSIFICATION OF FENTANYL SIGNALS TIGHTER CARGO OVERSIGHT

The US administration has reclassified illicit fentanyl and its precursor chemicals as weapons of mass destruction, reframing trafficking as a national security issue rather than solely a law-enforcement matter. While the move introduces no new trade bans, it broadens the enforcement tools available to federal agencies, with implications for cargo screening and compliance. As reported, the designation "*could increase friction for parts of the chemical and pharmaceutical supply chain,*" (Lennane, 2025) suggesting shippers and forwarders may face heightened scrutiny and documentation requirements.

Source: Lennane, A. (2025, December 16). *More shipper scrutiny as US declares fentanyl a weapon of mass destruction.* The Loadstar. *https://theloadstar.com/more-shipper-scrutiny-as-us-declares-fentanyl-a-weapon-of-mass-destruction/*

US TIGHTENS AIR CARGO DATA RULES TO STRENGTHEN SECURITY

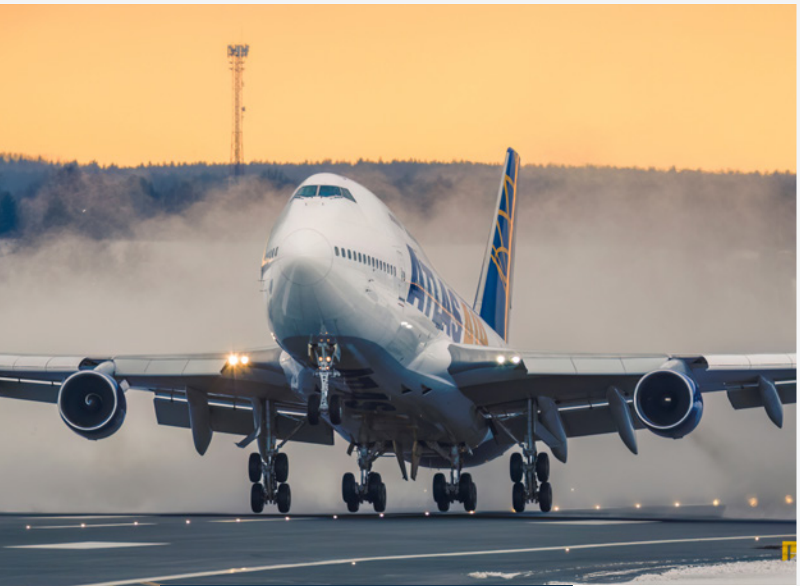
NORTH AMERICA MARKET AIR FREIGHT



U.S. Customs and Border Protection has introduced an updated air cargo screening rule that significantly expands data requirements for inbound shipments, with a strong focus on e-commerce traffic. The revised ACAS framework aims to address emerging security threats by increasing shipment transparency before cargo is loaded onto aircraft. CBP said the change is necessary after recent incidents exposed vulnerabilities, noting that e-commerce shipments "*present a special risk to aircraft, crewmembers, and passengers due to the relative anonymity associated with the transactions*" (Gallagher, 2025). The rule signals a major operational shift for carriers, forwarders, and online marketplaces.

Source: Gallagher, J. (2025, November 20). *Air cargo faces overhaul to comply with new CBP rule.* FreightWaves. https://www.freightwaves.com/news/air-cargo-faces-1bn-overhaul-to-comply-with-new-cbp-rule

ATLAS AIR SALE CONSIDERED AS MARKET POSITION STRENGTHENS



NORTH AMERICA MARKET AIR FREIGHT

Private equity firm Apollo is reportedly assessing a potential sale of Atlas Air Worldwide Holdings, signaling renewed interest in large-scale freighter operators amid long-term capacity constraints. According to Bloomberg, Apollo is in the early stages of reviewing its options, with interest emerging from both industry participants and financial investors. Atlas' outlook is supported by structural fleet dynamics, as its leadership has warned that a shortage of widebody freighters could impact the sector for years. As Atlas' CEO previously noted, "*a significant portion of the global widebody freighter fleet is approaching retirement age*," (Brett, 2025) positioning operators with scale to benefit from tightening supply.

Source: Brett, D. (2025, December 17). *Reports: Apollo considers sale of Atlas.* Air Cargo News. https://www.aircargonews.net/freighter-operators/reports-apollo-considers-sale-of-atlas/1081037.article

MEXICO RESHAPES IMPORT POLICY AS SUPPLY CHAINS AND TRADE TALKS CONVERGE

Mexico has announced a broad expansion of import tariffs on a wide range of goods originating from China and other Asian economies. "The tariffs, which take effect Jan. 1, will apply to goods including autos, auto parts, steel, aluminum, plastics, clothing, appliances, toys, footwear and textiles" (Mahoney, 2025). The move signals a strategic recalibration aimed at strengthening domestic production while responding to evolving regional trade dynamics. The tariffs arrive as regional trade dynamics come under renewed scrutiny ahead of the upcoming review of the U.S.–Mexico–Canada Agreement (USMCA). As trade policies evolve, companies operating in or through Mexico will need to closely monitor regulatory changes, engage with customs and compliance partners, and proactively adjust network design to mitigate disruption and capture emerging opportunities.

Source: Mahoney, N. (2025, December 11). *Mexico targets Asian imports with new tariffs ahead of USMCA negotiations*. FreightWaves. https://www.freightwaves.com/news/mexico-targets-asian-imports-with-new-tariffs-ahead-of-usmca-negotiations

STRONG DECEMBER BOOKINGS SIGNAL SUSTAINED MOMENTUM IN ASIA–EUROPE TRADE

Cargo demand on the Asia–Europe container trades accelerated sharply in December, signaling a strong close to the year and sustained momentum into early 2026. The trend reflects both structural demand growth and heightened supply chain risk management as cargo owners seek certainty ahead of the Lunar New Year. Logistics planners caution that forecasting has become increasingly complex, as transit times can vary significantly depending on routing decisions. "The rising volume through the fourth quarter is being accompanied by a steep increase in spot rates" (Knowler, 2025). From a marketing and logistics standpoint, the current environment reinforces the importance of early booking strategies, flexible inventory positioning, and strong coordination with logistics service providers.

Source: Knowler, G. (2025, December 10). Cargo bookings for Asia-Europe ocean trade rise sharply in December. Journal of Commerce. https://www.joc.com/article/cargo-bookings-for-asia-europe-ocean-trade-rise-sharply-in-december-6132177

CARRIERS RECONFIGURE ASIA–LATIN AMERICA NETWORKS AS TRADE MOMENTUM BUILDS

ASIA MARKET OCEAN FREIGHT

Ocean carriers serving Asia to Latin America trade lanes are reshaping their service networks and signaling firmer pricing intent as volume demand remains resilient, particularly along China–Brazil corridors. Ocean Network Express noted that "South America's trade relationships continue to diversify, with China becoming an increasingly important partner," a trend that is influencing long-term network planning across the region (Wallis, 2025). Several alliances and individual lines have announced network revisions designed to improve transit times, expand port coverage, and better align services with cargo flows. While capacity growth is testing commercial discipline, carriers' ongoing service realignments highlight a strategic bet on sustained trade expansion and deeper integration between Asian manufacturing hubs and Latin American consumer and export markets.

Source: Wallis, W. (2025, December 19). *Carriers plan rate hikes, revamp services on Asia-Latin America trade*. Journal of Commerce. https://www.joc.com/article/carriers-plan-rate-hikes-revamp-services-on-asia-latin-america-trade-6138442

HAINAN FREE TRADE PORT ENTERS NEW OPERATIONAL PHASE

ASIA MARKET OCEAN FREIGHT

The launch of island-wide special customs operations marks a pivotal step in the evolution of China's Hainan Free Trade Port (FTP), positioning the initiative as a major catalyst for trade facilitation, logistics connectivity, and international investment. As the world's largest free trade port by geographic area, Hainan's transition into this new operational phase reflects China's broader strategy to strengthen integration with global supply chains while advancing high-standard trade practices. "The special customs operations will give full play to the role of the Hainan FTP as a magnet for global investment and talent, and a new engine for high-quality development" (Huaxia, 2025). As global trade patterns continue to adjust, the full operational launch of the Hainan Free Trade Port adds capacity, flexibility, and resilience to international logistics networks.

Source: Huaxia. (2025, December 18). *Xinhua Commentary: Milestone progress of Hainan Free Trade Port poised to boost open global economy*. Xinhua. https://english.news.cn/20251218/6e343eddd45546f08e8ef13f8dc342f6/c.html

EU MOVES TO REINFORCE CUSTOMS OVERSIGHT ON CROSS-BORDER E-COMMERCE

The European Union has confirmed plans to impose a €3 customs duty per item on e-commerce parcels valued below €150 imported directly to consumers from third countries, effective July 2026. The measure is intended as a temporary response to the sharp rise in cross-border e-commerce shipments ahead of broader customs reform. The European Commission said the exemption was removed to address imbalances, noting that parcels under €150 are currently duty-free and that this advantage will be phased out earlier than planned; «The initial proposal for the removal foresaw application as from mid-2028. The Council adopted the removal of the exemption on 13th of November 2025, and called for an earlier application of the measure already in 2026," (Brett, 2025). The move follows similar action in the US, which has already reshaped global e-commerce air cargo flows.

Source: Brett, D. (2025, December 19). *European Union confirms new custom duty on e-commerce packages*. Air Cargo News. https://www.aircargonews.net/supply-chains/european-union-confirms-new-custom-duty-on-e-commerce-packages/1081047.article

NEW WEST GATE TUNNEL BOOSTS FREIGHT FLOW AND PORT CONNECTIVITY IN MELBOURNE

In a significant advancement for Victoria's freight and logistics network, the West Gate Tunnel has officially opened, offering a new direct corridor between the West Gate Freeway and the Port of Melbourne. This long-anticipated infrastructure delivers critical enhancements to supply chain efficiency and regional freight movement, strengthening one of Australia's busiest trade gateways. "Truck operators are also expected to benefit from strengthened ramps and bridges with better weight capacity" (Itimoudis, 2025). By improving direct access and reducing congestion, the West Gate Tunnel supports more reliable connections between hinterland supply chains and maritime gateways, an essential consideration for carriers and shippers navigating an increasingly competitive global market landscape.

Source: Itimoudis, A. (2025, December 18). *Port of Melbourne welcomes the opening of the West Gate Tunnel*. Container News. https://container-news.com/port-of-melbourne-welcomes-the-opening-of-the-west-gate-tunnel/

REGULATORY REVIEW HIGHLIGHTS MARKET ISSUES IN AUSTRALIA'S CONTAINERIZED TRADE NETWORK

According to the Australian Competition Consumer Commission (ACCC), "a government policy or regulatory response is likely required to address apparent market failures and improve Australia's container freight supply chain to the benefit of households and businesses" (Wallis, 2025). The latest container stevedoring monitoring report concluded that terminal operators are generating historically strong financial outcomes despite relatively stable operating conditions and available spare capacity across major ports. Looking ahead, the ACCC plans to engage with federal government officials to discuss its findings and possible next steps. For logistics stakeholders, the outcome of these discussions will be critical. Any policy or regulatory response could shape future investment signals, port competitiveness, and Australia's position within global container trade lanes.

Source: Wallis, K. (2025, December 12). *Australian government action needed to curb soaring terminal charges: regulator.* Journal of Commerce. .
https://www.joc.com/article/australian-government-action-needed-to-curb-soaring-terminal-charges-regulator-6133943

AFRICA EMERGES AS A KEY GROWTH ENGINE FOR GLOBAL CONTAINER NETWORKS

Container carriers are rapidly expanding services linked to Sub-Saharan Africa as the region emerges as one of the strongest growth engines in global liner shipping. Recent market data show that Africa, alongside the Middle East and South Asia, is outpacing traditional trade lanes as cargo owners and carriers adjust to shifting global demand patterns. An Alphaliner assessment described the shift clearly, noting that "*Africa and Middle East/India Subcontinent are now by far the fastest-growing markets*," with capacity expansion on Africa-linked services largely tied to Asia–Africa trade growth (Goldstone, 2025). Vessel deployment between Asia and West Africa alone has increased substantially over the past year, while combined services linking Southeast Asia with East and Southern Africa have also recorded strong gains.

Source: Goldstone, C. 2025, December 18). *Carriers boost capacity to meet growing demand on Africa trades.* The Loadstar.
https://theloadstar.com/carriers-boost-capacity-to-meet-growing-demand-on-africa-trades/