FrachtNEWS

LOGISTICS MARKET REPORT

GLOBAL MARKET | OCEAN FREIGHT

PANAMA CANAL CAPACITY REDUCTIONS ADD NEW PRESSURE TO GLOBAL SHIPPING NETWORKS

Shipping operations through the Panama Canal are facing another round of adjustments as below-average precipitation places additional pressure on the waterway's freshwater supply. According to the Panama Canal Authority (ACP), "the waterway handles approximately 5% of world trade and that more than 70% of the cargo moving through it originates in or is destined for the United States" (Chirls, 2026). Beginning in September, daily vessel transits will gradually reduce, potentially creating additional planning challenges for ocean carriers and cargo owners that depend on the canal for connections between Asia and ports along the U.S. East and Gulf coasts. "For booking dates from September 4, the canal will offer nine neopanamax and 25 panamax slots a day. From September 15, panamax availability drops again to 23 slots, taking total daily capacity to 32 vessels" (Chambers, 2026). Limited daily transit availability could lead to greater competition for confirmed reservations and increase the potential for waiting times among vessels arriving without secured bookings. The ACP is also adjusting previously announced draft restrictions and modifying its auction process for available transit slots. As conditions evolve, importers and exporters may benefit from monitoring vessel schedules, allowing additional flexibility in lead times and evaluating alternative routing options when necessary. The Panama Canal Authority continues to monitor Gatun Lake, watershed inflows, and evolving weather forecasts.

Sources: Chambers, S. (2026, August 21). *Panama Canal cuts daily capacity*. Splash247. https://splash247.com/panama-canal-cuts-daily-capacity/

Chirls, S. (2026, August 24). *Panama Canal new capacity cuts put US ports on notice*. FreightWaves. https://www.freightwaves.com/news/panama-canal-new-capacity-cuts-put-us-ports-on-notice

RETURN TO SUEZ CANAL GAINS TRACTION ACROSS CONTAINER SHIPPING

Container shipping through the Suez Canal is showing further signs of recovery as MSC begins restoring selected East-West services through the Red Sea corridor. MSC conducted "a comprehensive review of the latest security and operational conditions" before moving forward with the partial restoration of Suez Canal transits (The Maritime Executive, 2026). Rather than immediately returning its broader network to the corridor, the carrier is taking a measured approach, restoring routes across a limited number of services while maintaining contingency plans that allow individual voyages to be adjusted as conditions develop. This strategy indicates that routing flexibility will remain important as carriers continue assessing regional conditions. The move follows similar route adjustments by CMA CGM, Maersk, and Hapag-Lloyd as major ocean carriers continue to evaluate conditions in the region.

Source: The Maritime Executive. (2026, August 25). *MSC Follows Other Container Carriers in Return to Suez Canal and Red Sea*. The Maritime Executive. https://maritime-executive.com/article/msc-follows-other-container-carriers-in-reutrn-to-suez-canal-and-red-sea

GLOBAL MARKET | OCEAN FREIGHT

GLOBAL PORT DELAYS CREATE CAPACITY CHALLENGES FOR CONTAINER SHIPPING

GLOBAL MARKET | OCEAN FREIGHT

"Persistent port congestion is effectively removing 1.7m teu of container shipping capacity from the global market, with climate-driven disruption and larger-vessel calls adding to schedule delays, according to analysts" (Goldstone, 2026). The disruption reflects a combination of operational and environmental challenges. Extreme weather, including typhoons, heavy rainfall and drought conditions, can interfere with vessel schedules, while increasingly large containerships are concentrating substantial cargo volumes into individual port calls. Network design can further influence these infrastructure demands. Services that concentrate cargo exchanges among fewer ports may generate substantially larger container volumes during each call, increasing pressure on berth availability, terminal equipment, yard operations, and landside transportation connections. Building additional flexibility into lead times, closely monitoring terminal conditions, and evaluating alternative routing options may help supply chains manage the effects of schedule disruption as ports and carriers navigate ongoing capacity constraints.

Source: Goldstone, C. (2026, August 19). *Global port congestion keeping 1.7m teu of capacity out of the market*. The Loadstar. https://theloadstar.com/global-port-congestion-keeping-1-7m-teu-of-capacity-out-of-the-market/

Fracht GROUP

TIGHTER CUSTOMS RULES SQUEEZE CHINA’S E-COMMERCE AIRFREIGHT BOOM

New analysis from Trade and Transport Group shows cross-border e-commerce made up nearly 18% of intercontinental air cargo last year despite representing just 6% of global online sales, with China-based platforms like Temu, Shein, and AliExpress driving the bulk of it. The consultancy found e-commerce revenue fell 4.5% in the first half of 2026 as the US ended its de minimis exemption and the EU introduced a new per-item customs charge. Trade and Transport Group expects these shifts to push the sector toward more localized fulfillment and consolidated shipping, potentially moving volume from air to sea (Goldstone, 2026).

Source: Goldstone, C. (2026, August 14). *Customs crackdowns on Chinese ecommerce threaten airfreight demand.* The Loadstar. https://theloadstar.com/customs-crackdowns-on-chinese-ecommerce-threaten-airfreight-demand/

AIR CARGO VOLUMES DIP AMID TYPHOON DISRUPTION AND E-COMMERCE POLICY SHIFT

Global airfreight volumes softened in early August, with chargeable weight declining from every major origin region, according to WorldACD data. Typhoon Dolphin disrupted Chinese flows, triggering evacuations and widespread flight cancellations, while some shippers shifted cargo from ocean to air. WorldACD noted that traffic had “fluctuated within a narrow band“ over the preceding month, alternating between contraction and growth (Goldstone, 2026). Europe-bound e-commerce volumes also continued shrinking, reinforcing a shift toward higher-value cargo.

Source: Goldstone, C. (2026, August 17). *Global air freight rates take a dip as volumes lose height.* The Loadstar. https://theloadstar.com/global-air-freight-rates-take-a-dip-as-volumes-lose-height/

DATA CENTRE BOOM FILLS AIRFREIGHT GAP LEFT BY E-COMMERCE SLOWDOWN

AI data centre construction has become a major new driver of transpacific air cargo, offsetting the drop in China-US e-commerce shipments after de minimis exemptions ended. Trade and Transport Group's Frederic Horst says Asia-to-US volumes now exceed 2022 pandemic-era peaks, fueled largely by servers and memory from Taiwan. Data centre-related goods have jumped from roughly 7% to 20% of US air imports from Asia since mid-2024. Horst remains skeptical the trend will last, telling The Loadstar, "I think it's a bubble, and a lot of the expected long-term investment may not materialise" (Goldstone, 2026).

Source: Goldstone, C. (2026, August 6). *AI boom keeping air cargo demand flying may be just 'a bubble'.* The Loadstar. https://theloadstar.com/ai-boom-keeping-air-cargo-demand-flying-may-be-just-a-bubble/

STORM-RELATED PORT OMISSIONS TIGHTEN CONTAINER AVAILABILITY ACROSS KEY CHINA TRADES

Container equipment availability at several major Chinese gateways is facing increased pressure as lingering congestion following Typhoon Dolphin disrupts vessel schedules and the normal circulation of containers. The storm's impact has contributed to skipped port calls and significant reductions in available shipping capacity at Shanghai, Ningbo and Qingdao. The effects have been particularly significant for Asia–Latin America and Asia–Europe services, where disrupted sailing schedules can interfere with the repositioning of empty containers needed for upcoming exports. "The loss of capacity will also put upward pressure on soaring rates in lanes between North Asia and the Americas" (Wallis, 2026). Although port conditions are recovering from the storm, operations may take additional time to normalize as carriers work through vessel queues, restore scheduled calls and reposition containers across affected trade lanes.

Source: Wallis, K. (2026, August 21). *Shippers suffer big capacity loss as carriers skip key Chinese ports post-storm.* Journal of Commerce. https://www.joc.com/article/shippers-suffer-big-capacity-loss-as-carriers-skip-key-chinese-ports-post-storm-6274234

STRONG TRANS-PACIFIC DEMAND TIGHTENS CONTAINER AVAILABILITY AHEAD OF GOLDEN WEEK

Sustained import demand on the eastbound trans-Pacific is increasing pressure on container availability as carriers prepare for elevated cargo volumes through China's Golden Week holiday in early October. Expectations that U.S. imports from Asia would begin declining after significant frontloading earlier in the year have not materialized, leaving carriers and forwarders managing stronger-than-anticipated freight activity alongside ongoing supply chain disruptions. "The continued strong import volumes have bolstered the ability of carriers to impose general rate increases (GRIs) twice a month" (Mongelluzzo, 2026). Although carriers are preparing to add vessel capacity to the U.S. West Coast in September, additional space does not necessarily eliminate equipment concerns at origin. Securing container allocations early and maintaining flexibility around origin ports and sailing schedules may help reduce exposure to potential equipment constraints as carriers work to restore normal container flows.

Source: Mongelluzzo, B. (2026, August 25). *Robust trans-Pacific expected to maintain strength into Golden Week.* Journal of Commerce. https://www.joc.com/article/robust-trans-pacific-expected-to-maintain-strength-into-golden-week-6276192

ARCTIC CONTAINER SERVICE EXPANDS CHINA–EUROPE ROUTING OPTIONS

Sea Legend has transitioned its Arctic shipping program from a trial voyage into scheduled weekly operations along Russia's Northern Sea Route, representing a notable development in the use of Arctic waters for containerized trade. While the route is unlikely to replace established trade corridors between major Asian and European markets, its expansion could provide another option for selected cargo requiring shorter transit times or greater routing flexibility. "The service links Ningbo-Zhoushan with Felixstowe, Rotterdam, Hamburg and Gdynia" (Chambers, 2026). Sea Legend plans to work toward maintaining approximately four months of reliable Arctic operations annually while gradually extending the available sailing season. As additional voyages establish a larger operating history, the logistics industry will gain a clearer picture of the route›s reliability, scalability, and potential role within broader China-Europe transportation networks.

Sources: Chambers, S. (2026, August 17). *China's Arctic container experiment turns into weekly service.* Splash247. https://splash247.com/chinas-arctic-container-experiment-turns-into-weekly-service/

Chen, Y. (2026, July 16). *20 Days From China to Europe: Sea Legend Relaunches CAX Arctic Express with Eight Weekly Sailings.* Xinde Marine News. https://www.xindemarinenews.com/news/2077650383913914370

CATHAY CARGO TURNS TO LEASED UNILODE FIRE CONTAINMENT COVERS AS BATTERY RISKS CLIMB

Cathay Cargo has signed on as the first airline to use Unilode's new fire containment cover leasing program, gaining on-demand access to certified covers, network-wide availability, full lifecycle upkeep, and rapid deployment support. Tim Wong, Cathay Cargo's general manager of cargo service delivery, noted that "safety is at the heart of everything we do at Cathay Cargo" (Brett, 2026). The move comes as lithium battery shipments drive up thermal runaway incidents industry-wide, prompting carriers to seek more flexible, better-maintained containment solutions rather than owning equipment outright.

Source: Brett, D. (2026, August 20). *Cathay Cargo becomes launch customer for Unilode's fire containment cover leasing service*. Air Cargo News. https://www.aircargonews.net/editorial/2026/08/cathay-cargo-becomes-launch-customer-for-unilodes-fire-containment-cover-leasing-service/

ASIA MARKET AIR FREIGHT

FREIGHTERS FLOCK TO NAVI MUMBAI AS AIRLINES REROUTE AROUND MUMBAI'S RESTRICTIONS

ASIA MARKET AIR FREIGHT

With Mumbai Airport curbing freighter operations amid infrastructure upgrades, carriers are shifting cargo services to Navi Mumbai International Airport (NMIA). Hong Kong Air Cargo became NMIA's first international freighter operator, launching thrice-weekly A330-200F flights. Cathay Cargo and Air France-KLM are reportedly planning similar moves. Industry veteran Joy John told The Loadstar that "NMIA is poised to be the new freighter hub for India in the coming years" (Mathais, 2026). Adani aims to scale NMIA's cargo handling toward three million tons over time.

Source: Mathais, A. (2026, August 17). *Major airlines are lining up their freighters on the runway at NMIA*. The Loadstar. https://theloadstar.com/major-airlines-are-lining-up-their-freighters-on-the-runway-at-nmia/

ASIA-EUROPE TRADE LANE RATES RISE ON CAPACITY SHIFT

Asia Pacific-to-Europe spot rates rose 1% week on week in early August, led by gains from China and Hong Kong, even as new EU e-commerce charges and Typhoon Dolphin's disruption of Chinese flights weighed on volumes. Declines from South Korea, Singapore, Taiwan, and Japan were offset by the China/Hong Kong increases. WorldACD explained that the pricing rise, despite falling ecommerce demand, points to a broader capacity shift: "freighter capacity previously deployed for e-commerce transport to Europe has shifted elsewhere, with the transpacific sector the obvious target" (Brett, 2026).

Source: Brett, D. (2026, August 18). *Asia Pacific to Europe airfreight rates rise despite volume pressure*. Air Cargo News.
https://www.aircargonews.net/data/2026/08/asia-pacific-to-europe-airfreight-rates-rise-despite-volume-pressure/

ASIA MARKET | AIR FREIGHT

NORTHERN EUROPE CARGO NETWORKS ADJUST TO RHINE CONSTRAINTS

EUROPE MARKET | OCEAN FREIGHT

Low water levels along the Rhine River are challenging inland transportation networks and increasing the risk of additional congestion at Northern Europe's major container gateways. As a major inland transportation artery, the Rhine connects Rotterdam and Antwerp with manufacturing, warehousing and distribution centers throughout the continent. "The impact of low water on the Rhine was already visible across the supply chain in the form of higher costs, longer lead times, reduced schedule reliability and the rising risk of missed delivery windows" (Knowler, 2026). If restrictions continue, transportation providers may increasingly rely on alternative inland modes to maintain cargo flow. However, shifting significant container volumes between modes can create additional operational challenges, particularly when rail and trucking capacity is limited. Maintaining flexibility across transportation modes and allowing additional lead time may help reduce the impact of ongoing disruptions.

Source: Knowler, G. (2026, August 12). *Low water on Rhine risks pushing bottlenecks back to Rotterdam, Antwerp*. Journal of Commerce.
https://www.joc.com/article/low-water-on-rhine-risks-pushing-bottlenecks-back-to-rotterdam-antwerp-6268781

REDUCED CAPACITY AND PRICE INCREASES PUT TRANS-ATLANTIC SHIPPING IN FOCUS

EUROPE MARKET | OCEAN FREIGHT

Container availability across the trans-Atlantic remains an important consideration for shippers even as overall cargo demand between Europe and North America shows signs of softening. Carriers have continued to adjust their networks through blank sailings and other capacity reductions, which can affect the circulation and positioning of containers across individual ports and trade corridors. "September could prove to be an expensive month for trans-Atlantic shippers, with some ocean carriers announcing hefty rate increases, substantial peak season surcharges (PSSs) and rising fuel fees on inland shipments despite softening demand" (Knowler, 2026). While these financial measures are separate from equipment availability, the underlying network adjustments occurring across the trade could have broader implications for container positioning.

Source: Knowler, G. (2026, August 26). *Carriers attempt peak surcharges, rate increases on trans-Atlantic*. Journal of Commerce. *https://www.joc.com/article/carriers-attempt-peak-surcharges-rate-increases-on-trans-atlantic-6276636*

AMAZON LOW WATER THREATENS TRANSPORTATION CAPACITY AND EQUIPMENT AVAILABILITY

LATAM MARKET | OCEAN FREIGHT

Declining water levels across the Amazon River system are creating growing logistics challenges for cargo moving to and from Manaus, Brazil, as carriers prepare for navigation restrictions during the region's dry season and announce low-water surcharges. The developing conditions are expected to increase demand for vessels, barges, tugs, floating infrastructure, and other transportation resources required to keep containerized cargo moving when normal vessel access becomes restricted. If river levels fall further, vessels may be unable to reach Manaus altogether, potentially requiring complete discharge at floating pier facilities. "Brazilian terminal operator Grupo Chibatão is preparing to reactivate temporary transhipment infrastructure at Itacoatiara" (Chambers, 2026). Closely monitoring river conditions, carrier contingency plans, and the availability of alternative transportation resources will remain increasingly important as the dry season progresses.

Source: Chambers, S. (2026, August 24). *Amazon drought triggers container surcharges of up to $1,900*. Splash247. *https://splash247.com/amazon-drought-triggers-container-surcharges-of-up-to-1900/*

RISING CARGO ACTIVITY STRAINS RESOURCES AT PORT OF SANTOS

LATAM MARKET | OCEAN FREIGHT

"Container terminals at the Port of Santos are operating increasingly close to their capacity limit, raising concerns among industry specialists about mounting logistics costs at Latin America's largest port complex" (Malheiros, 2026). The capacity challenges extend beyond available berth space. Higher container activity requires sufficient cranes, yard-handling machinery, storage space, trucks and other resources to transfer cargo between vessels, terminals and inland transportation networks. As utilization increases, these assets have less flexibility to absorb vessel bunching, schedule disruptions or unexpected surges in container arrivals. Terminal operators have also pointed to road and rail bottlenecks surrounding Santos as another constraint on the port's ability to efficiently move containers into and out of terminal facilities. Until improvement projects are implemented, shippers and logistics providers should remain prepared for continued challenges involving container availability, vessel scheduling and cargo movement through Santos.

Source: Malheiros, G. (2026, July 20). *Container Handling Costs Soar as Port of Santos Nears Capacity*. Datamar News. *https://datamarnews.com/noticias/container-handling-costs-soar-as-port-of-santos-nears-capacity/*

TARGETED JONES ACT RELIEF ADDS NEW COMPLIANCE STEPS FOR MARITIME OPERATORS

NORTH AMERICA MARKET | OCEAN FREIGHT

The third Jones Act waiver issued since March introduces additional compliance considerations for companies transporting certain energy commodities within the United States. Taking effect August 17 and continuing through November 15, 2026, the measure narrows both the range of potentially eligible products and the process through which shipments receive authorization. "Under the latest framework, the Maritime Administration (MARAD) will consider waiver requests individually rather than treating listed cargoes as automatically exempt" (WorkBoat Staff, 2026). The new framework places greater responsibility on shippers, carriers, and logistics providers to confirm eligibility before cargo moves. Rather than assuming that a listed commodity automatically qualifies, stakeholders will need to verify that each shipment receives the necessary authorization and satisfies applicable documentation requirements.

Source: WorkBoat Staff. (2026, August 17). *Third Jones Act waiver takes effect today. How does it differ?*. WorkBoat. *https://www.workboat.com/what-operators-need-to-know-about-the-latest-jones-*

WORLD TRADE BRIDGE EXPANSION TARGETS GROWING CROSS-BORDER FREIGHT FLOWS

Growing freight activity between the United States and Mexico is placing increasing pressure on the infrastructure available to process commercial trucks at one of North America's most important cross-border gateways. Mexico's Tamaulipas state is preparing a major expansion of the World Trade Bridge between Nuevo Laredo, Mexico, and Laredo, Texas. "The project calls for widening the bridge's existing structure from eight to 10 lanes and constructing a parallel eight-lane span" (Mahoney, 2026). While the additional lanes are intended to relieve a major freight bottleneck, increasing border capacity could also place greater demands on the transportation assets required to support higher cargo throughput. As more freight moves through the corridor, carriers and logistics providers may need additional tractors, trailers and related resources to maintain efficient cargo flows.

Source: Mahoney, N. (2026, August 7). *Mexico plans major expansion of busiest cross-border truck crossing*. FreightWaves. *https://www.freightwaves.com/news/mexico-plans-major-expansion-of-busiest-cross-border-truck-crossing*

NORTH AMERICA MARKET **OCEAN FREIGHT**

DURBAN BACKLOG GROWS AMID TERMINAL RESOURCE LIMITATIONS

AFRICA MARKET **OCEAN FREIGHT**

Longstanding equipment limitations at South Africa's Durban Gateway Terminal are contributing to mounting congestion and extended cargo delays, creating additional challenges for shippers and freight forwarders moving containers through one of the region's most important trade gateways. Pier 2 has become particularly constrained as the terminal works through a growing backlog of vessels and containers. "Part of the problem is that South Africa has struggled since the rerouting of vessels round the Cape from the Red Sea - an issue compounded by the closure of the Strait of Hormuz" (Whiteman, 2026). The backlog could take several weeks or longer to resolve, particularly if additional vessels and containers continue arriving before existing cargo is cleared. Until terminal productivity improves and longstanding equipment constraints are addressed, cargo owners and logistics providers should anticipate continued challenges with container movement, equipment positioning and shipment scheduling through Durban.

Source: Whiteman, A. (2026, August 25). *Carriers warn of 20-day delays as congestion crisis at Durban worsens*. The Loadstar. *https://theloadstar.com/carriers-warn-of-20-day-delays-as-congestion-crisis-at-durban-worsens/*