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LOGISTICS MARKET REPORT



GLOBAL MARKET | OCEAN FREIGHT

SEVERE WEATHER DISRUPTS MAJOR PORTS ACROSS ASIA AND EUROPE

A series of severe weather events has interrupted maritime operations across several major international shipping regions, creating additional challenges for global container transportation networks. “The storms hit during the Pacific typhoon season and an autumn European storm spell, and they arrived at ports that were already congested” (Faulkner, 2026). Typhoon Champi caused temporary operational suspensions and vessel restrictions at major ports in Taiwan and mainland China. Shanghai, Ningbo, Kaohsiung, Taipei, and Keelung experienced varying levels of disruption before resuming activities. However, accumulated vessel traffic and cargo processing requirements continued to present challenges following reopening. In Northern Europe, Storm Austen disrupted operations at Rotterdam and Le Havre, temporarily limiting terminal activity and inland transportation connections. Rotterdam experienced delays involving feeder vessels and barge services, while Bremerhaven encountered additional complications following a weather-related vessel collision. India›s eastern ports were placed on alert as Cyclone Arnab approached Andhra Pradesh. Weather warnings at Visakhapatnam, Gangavaram, and Krishnapatnam raised concerns about possible interruptions to vessel arrivals and departures. The storms provide carriers with temporary relief by absorbing effective capacity and offering some support to spot rates. However, vessel bunching continues across Southeast and South Asia. Any short-term improvement is unlikely to reverse the downward trend, as excess capacity, aggressive price competition, and the winter slowdown continue to pressure rates. Continued coordination among ocean carriers, terminal operators, and inland transportation providers will be essential as affected facilities address accumulated cargo and work to restore operational consistency. Monitoring carrier advisories and terminal updates will be particularly important for anticipating changes to international cargo movements.

Source: Faulkner, W. (2026, October 28). *Typhoon, Storm and Cyclone Disrupt Ports from Taiwan to Rotterdam to India’s East Coast in One Week.* ChemAnalyst. *https://www.chemanalyst.com/NewsAndDeals/NewsDetails/typhoon-storm-and-cyclone-disrupt-ports-from-taiwan-45207*

LOW RHINE WATER LEVELS DISRUPT INLAND CARGO FLOWS ACROSS EUROPE

GLOBAL MARKET OCEAN FREIGHT



Unseasonably low water levels along the Rhine River are creating operational challenges for European inland transportation networks. Reduced barge loading capacity is shifting container volumes toward rail and road services, increasing pressure on transportation infrastructure serving major European ports. The restrictions are particularly affecting cargo movements connecting Rotterdam and Antwerp with inland destinations in Germany and Switzerland. As SeasC4U's Gunther Ginckels explained, "Cargo is still moving, but carrying capacity is sharply reduced, transport costs have risen, transit times are longer and less predictable, while inland terminals, rail networks, and trucking markets are absorbing displaced cargo at higher cost and delays" (Whiteman, 2026). Rail operators are facing equipment shortages and limited available train paths, while trucking providers are struggling to accommodate additional volumes. These constraints are contributing to longer transit times and reduced predictability. Continued monitoring of Rhine River conditions, inland transportation availability, and potential service adjustments will be essential for effective planning and coordination of European import and export shipments.

Source: Whiteman, A. (2026, October 15). *Low Rhine water level driving barge cargo to capacity-strained road and rail.* The Loadstar. https://theloadstar.com/low-rhine-water-level-driving-barge-cargo-to-capacity-strained-road-and-rail/

MAJOR SHIPPING LINES GRADUALLY RESTORE RED SEA SERVICES



GLOBAL MARKET OCEAN FREIGHT

Container shipping networks connecting the Far East and Europe are undergoing further adjustments as carriers progressively restore Suez Canal transits. "Having surveyed the 10 largest carrier networks over the past month, Alphaliner found vessels on 24 of the 46 direct Far East–Europe services were transiting the Red Sea, accounting for 70% of deployed capacity on Far East-Mediterranean routes" (Whiteman, 2026). While several major carriers have resumed operations, others continue to maintain alternative routing arrangements. The evolving network structure reflects efforts to improve transit efficiency while retaining operational flexibility. The continued transition could influence vessel rotations, transit times, and equipment availability across international shipping networks. Those coordinating Far East–Europe cargo movements should monitor carrier announcements and potential routing adjustments.

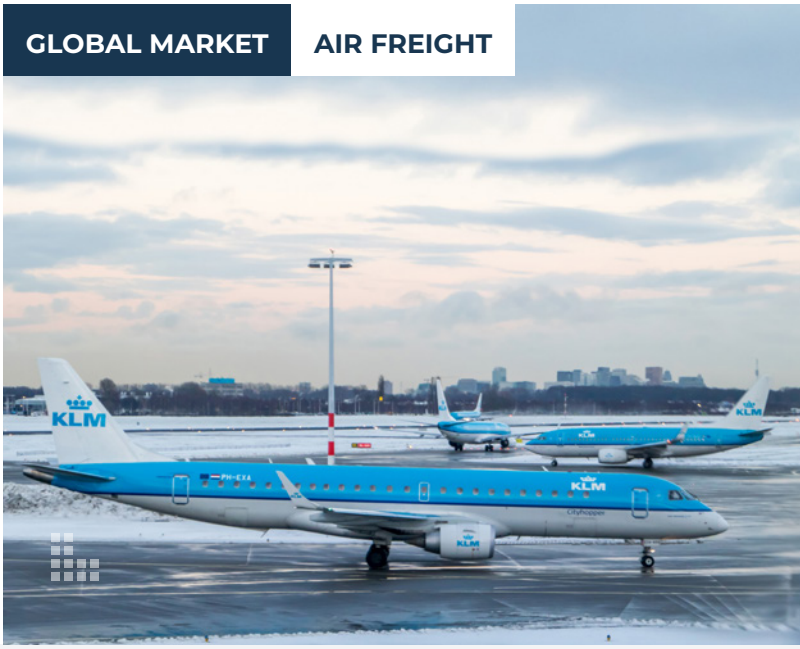
Source: Whiteman, A. (2026, October 21). *Nearly two-thirds of Far East-Europe capacity now back to Suez Canal.* The Loadstar. https://theloadstar.com/nearly-two-thirds-of-far-east-europe-capacity-now-back-to-suez-canal/

AIRLINES EXPAND WINTER FREIGHTER NETWORKS ACROSS ATLANTIC, PACIFIC AND LATIN AMERICA

Airlines are bolstering freighter capacity ahead of the winter season, adding transatlantic, transpacific and Latin American links to serve peak demand. Air Canada Cargo is launching new 767 freighter services to Amsterdam, Monterrey and Panama City, while Lufthansa Cargo expands its Asia-Pacific footprint to 46 weekly rotations. Air France-KLM-Martinair Cargo adds Paris-Cairo Boeing 777F services, and JAL has launched a new Narita-Los Angeles codeshare with Atlas Air. Cathay Cargo also links additional Americas capacity to surging semiconductor and data-centre shipments from Asia. Air Canada's Matthieu Casey noted the additions give "dedicated main-deck capacity at a time of year when transatlantic capacity is more constrained" (Lennane, 2026).

Source: Lennane, A. (2026, October 20). *Airlines strengthen winter freighter links, as forwarders face capacity shuffle.* The Loadstar. *https://theloadstar.com/airlines-strengthen-winter-freighter-links-as-forwarders-face-capacity-shuffle/*

GLOBAL MARKET **AIR FREIGHT**



AI INFRASTRUCTURE DEMAND THREATENS SHARP PEAK SEASON CAPACITY SQUEEZE FOR AIR FREIGHT



GLOBAL MARKET **AIR FREIGHT**

AI hyperscalers still seeking peak-season freighter capacity risk pushing air freight rates significantly higher, as demand for servers, chips and data centre equipment adds pressure to an already firm market. US air freight imports by weight reached a record in August, up 20% year-on-year, driven primarily by GPU components and memory products — underscoring what analysts describe as the "disproportionate role" of AI infrastructure investment in generating freight demand (Lennane, 2026). Compounding the pressure, jet fuel costs have surged 111% year-on-year, rising faster than freight rates and squeezing carrier margins. Carriers including Cathay Cargo and Japan Airlines have already announced fuel surcharge increases for October.

Source: Lennane, A. (2026, October 14). *AI shippers still looking for capacity risk sharp airfreight peak squeeze.* The Loadstar. *https://theloadstar.com/ai-shippers-still-looking-for-capacity-risk-sharp-airfreight-peak-squeeze/*

AIRBUS A350 FREIGHTER COMPLETES HISTORIC FIRST TEST FLIGHT AHEAD OF 2027 COMMERCIAL DELIVERY

GLOBAL MARKET AIR FREIGHT



Airbus successfully completed the first test flight of its A350 widebody freighter from Toulouse, marking a major milestone in the race to challenge Boeing's dominance in the large freighter market. The aircraft — carrying 115 orders from 14 customers — features a 111-metric-ton payload, the industry's largest cargo door and a 20% fuel efficiency improvement over previous-generation freighters. Airbus head of widebody and freighter marketing Sarah McLaren noted: "It has been built by Airbus, but really it has been designed by the market. Operators were coming to us to say they wanted choice" (Kulisch, 2026). Commercial deliveries are targeted for late 2027, though some analysts expect revenue service to begin in 2028.

Source: Kulisch, E. (2026, September 29). *Airbus A350 freighter aircraft completes initial test flight.* FreightWaves. *https://www.freightwaves.com/news/airbus-a350-freighter-aircraft-completes-initial-test-flight*

VESSEL DELAYS DISRUPT TRADITIONAL GOLDEN WEEK CAPACITY ADJUSTMENTS



ASIA MARKET OCEAN FREIGHT

Ocean container capacity on major Asia–Europe and transpacific trade routes reached unprecedented levels during China›s 2026 Golden Week holiday period instead of following traditional seasonal reductions. "Port congestion in Asia, caused by a succession of typhoons, led to vessel bunching at loading ports, and subsequently resulted in a series of "double sailings", which cancelled out carriers' blanking strategy during the holiday period when they typically look to skip voyages due to a lack of cargo sitting on Asia's docks" (van Marle, 2026). For global supply chains, the principal concern remains the consistency of vessel departures and arrivals. Elevated capacity does not automatically translate into dependable transportation schedules, particularly when congestion continues affecting major port networks. Ongoing evaluation of carrier announcements, port conditions, and vessel rotation changes will remain important as shipping networks work toward greater stability.

Source: van Marle, G. (2026, October 26). *Congestion-induced 'double sailings' cancel out Golden Week blanks.* The Loadstar. *https://theloadstar.com/congestion-induced-double-sailings-cancel-out-golden-week-blanks/*

AI AND EV BOOM RESHAPES ASIA-PACIFIC SEMICONDUCTOR SUPPLY CHAINS FOR AIR CARGO

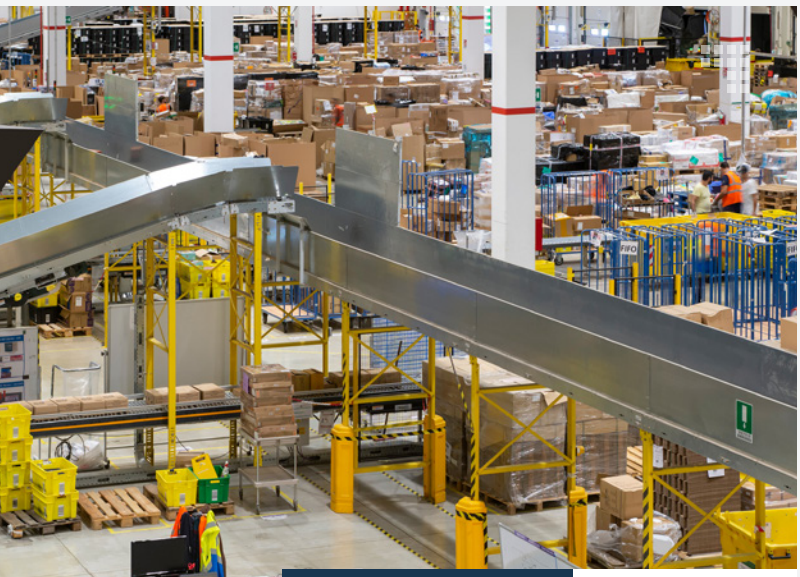
ASIA MARKET AIR FREIGHT



Asia-Pacific's expanding semiconductor industry is generating significant new air cargo opportunities as AI and electric vehicle demand drives more frequent, high-value cross-border shipments. The region accounts for roughly 57% of global semiconductor revenue, with production increasingly dispersed across specialized hubs — Taiwan and South Korea lead advanced fabrication, while Vietnam, Malaysia and the Philippines handle assembly and testing. A new industry report notes that "since a single semiconductor often requires design, fabrication, and packaging in different hubs, there is increased cross-border movement of prototypes, test wafers, and high-value spares" (STAT Times, 2026). The shift toward smaller, customized consignments and tighter production schedules is making frequent, reliable air connections essential across the region.

Source: STAT Times. (2026, October 18). *AI boom reshapes Asia's semiconductor supply chains*. The STAT Trade Times. *https://www.stattimes.com/air-cargo/ai-boom-reshapes-asias-semiconductor-supply-chains-1360969*

RISING EU PARCEL CHARGES PUSH RETAILERS TO RECONSIDER CROSS-BORDER FULFILMENT MODELS



EUROPE MARKET AIR FREIGHT

A new €2 EU handling fee per product category expected from 1 November — on top of the €3 customs duty introduced in July — is intensifying pressure on brands that ship directly to EU consumers from outside the bloc. The cumulative charges are prompting a rethink on fulfilment strategy, with local stock-holding in Europe becoming increasingly attractive. This comes against a backdrop of constrained China-Europe freighter capacity, down significantly year-on-year. One industry advisor noted: "It is a little early to see brands switch. We expect the first changes when brands plan their stock for next year" (Lennane, 2026). Air freight is expected to remain relevant for bulk replenishment even as models evolve.

Source: Lennane, A. (2026, October 19). *New EU parcel charges add pressure for rethink on cross-border fulfilment.* The Loadstar. *https://theloadstar.com/new-eu-parcel-charges-add-pressure-for-rethink-on-cross-border-fulfilment/*

AMAZON LOW-WATER CONDITIONS PUT CARRIER SURCHARGE PRACTICES UNDER REVIEW

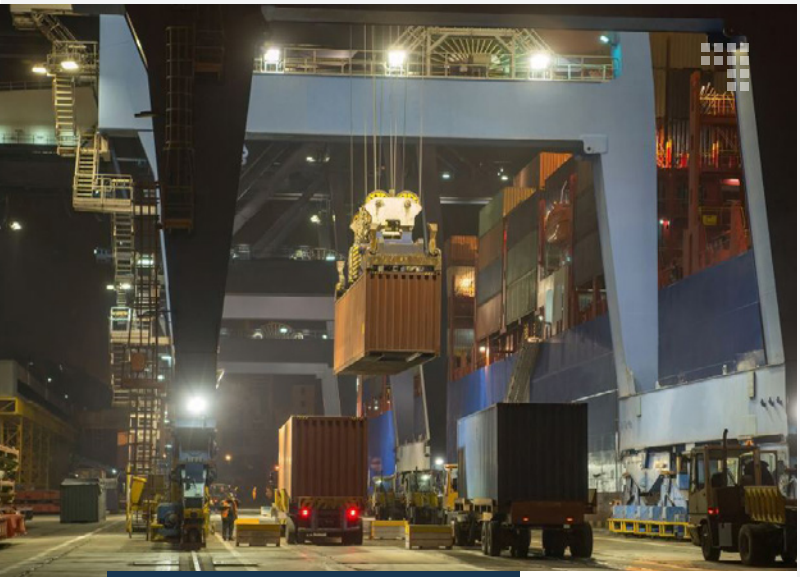
LATAM MARKET OCEAN FREIGHT



Low-water conditions on Brazil's Negro River are creating renewed capacity concerns for container shipping while also prompting closer examination of how carriers establish extraordinary surcharges. Brazil's National Waterway Transportation Agency (ANTAQ) recently introduced requirements directing carriers to provide documentation supporting low-water surcharges before they are implemented. The framework seeks to establish a clearer connection between changing river conditions, reduced vessel capacity and additional operational requirements. "Under rules announced Sept. 15, carriers must notify ANTAQ at least 30 days before a new surcharge and provide evidence linking river conditions to capacity losses, added costs and the amount proposed" (Branco, 2026). Brazil's framework may be worth monitoring as low-water events continue to affect major inland waterways and maritime trade routes worldwide.

Source: Branco, V. (2026, September 24). *Brazil scrutiny of low-water surcharges raises questions for other waterways.* Journal of Commerce. *https://www.joc.com/article/brazil-scrutiny-of-low-water-surcharges-raises-questions-for-other-waterways-6293774*

TRANSPACIFIC CONTAINER TRADE MAINTAINS MOMENTUM AMID REGIONAL ECONOMIC DIFFERENCES



NORTH AMERICA MARKET OCEAN FREIGHT

Different economic conditions in the United States and Europe are shaping container shipping expectations as 2026 approaches its final quarter. U.S. consumer demand and inventory requirements continue to support transpacific cargo movements, while slower European economic growth presents challenges for Asia-Europe services. According to Evergreen General Manager Wu Kuang Hui, the U.S. market remains resilient heading into the Lunar New Year. Wu emphasized that "there are record-high import volumes at several major US ports, low inventory levels, and optimistic consumer demand" (Koo, 2026). As carriers restore traditional routing options, changes in vessel deployment and effective capacity are expected to affect operational planning across the trade. Continued monitoring of port operations, carrier schedules, and economic indicators will be important as the industry prepares for early 2027.

Source: Koo, A. (2026, October 13). *Strong US import demand will support transpacific rates till new year.* The Loadstar. *https://theloadstar.com/strong-us-import-demand-will-support-transpacific-rates-till-new-year/*

US CUSTOMS TIGHTENS RULES FOR LOW-VALUE IMPORTS AS DE MINIMIS OVERHAUL CONTINUES

US Customs & Border Protection has introduced stricter data and filing requirements for low-value shipments, requiring electronic submission upon or before arrival — replacing the previous 15-day window. The changes are part of the broader regulatory overhaul following the end of the de minimis exemption for imports valued below $800, with a hard sunset set for 1 July next year. A new entry category for postal imports has also been created, mandating electronic filing and additional data fields including shipper details and package tracking numbers. Industry observers warn that "the era of lightweight clearance procedures for parcel freight has closed" (Putzger, 2026), requiring urgent operational and system alignment across the supply chain.

Source: Putzger, I. (2026, October 20). *US Customs wants more data and earlier filing for low-value imports.* The Loadstar. *https://theloadstar.com/us-customs-wants-more-data-and-earlier-filing-for-low-value-imports/*



NORTH AMERICA MARKET AIR FREIGHT

RECORD INTERMODAL VOLUMES SIGNAL CHANGES AHEAD FOR U.S. RAIL TRANSPORTATION



NORTH AMERICA MARKET RAIL FREIGHT

The North American intermodal market is experiencing a notable shift as record container volumes and tightening trucking capacity influence transportation strategies. "Major US railroads are preparing to demand sharp rate increases from intermodal shippers in upcoming contract renewals" (Ashe, 2026). CSX Transportation, Norfolk Southern Railway, and Union Pacific Railroad anticipate that upcoming contract negotiations will reflect evolving supply and demand conditions across the surface transportation sector. Rail operators have emphasized that many existing agreements were negotiated before the truckload market began tightening. As these agreements approach expiration, carriers are preparing to incorporate current transportation conditions into their 2027 strategies. Transportation planners should monitor intermodal capacity, equipment availability, and carrier contract developments to maintain supply chain flexibility.

Source: Ashe, A. (2026, October 22). *Railroads eager to raise intermodal rates as market dynamics shift.* Journal of Commerce. *https://www.joc.com/article/railroads-eager-to-raise-intermodal-rates-as-market-dynamics-shift-6310220*