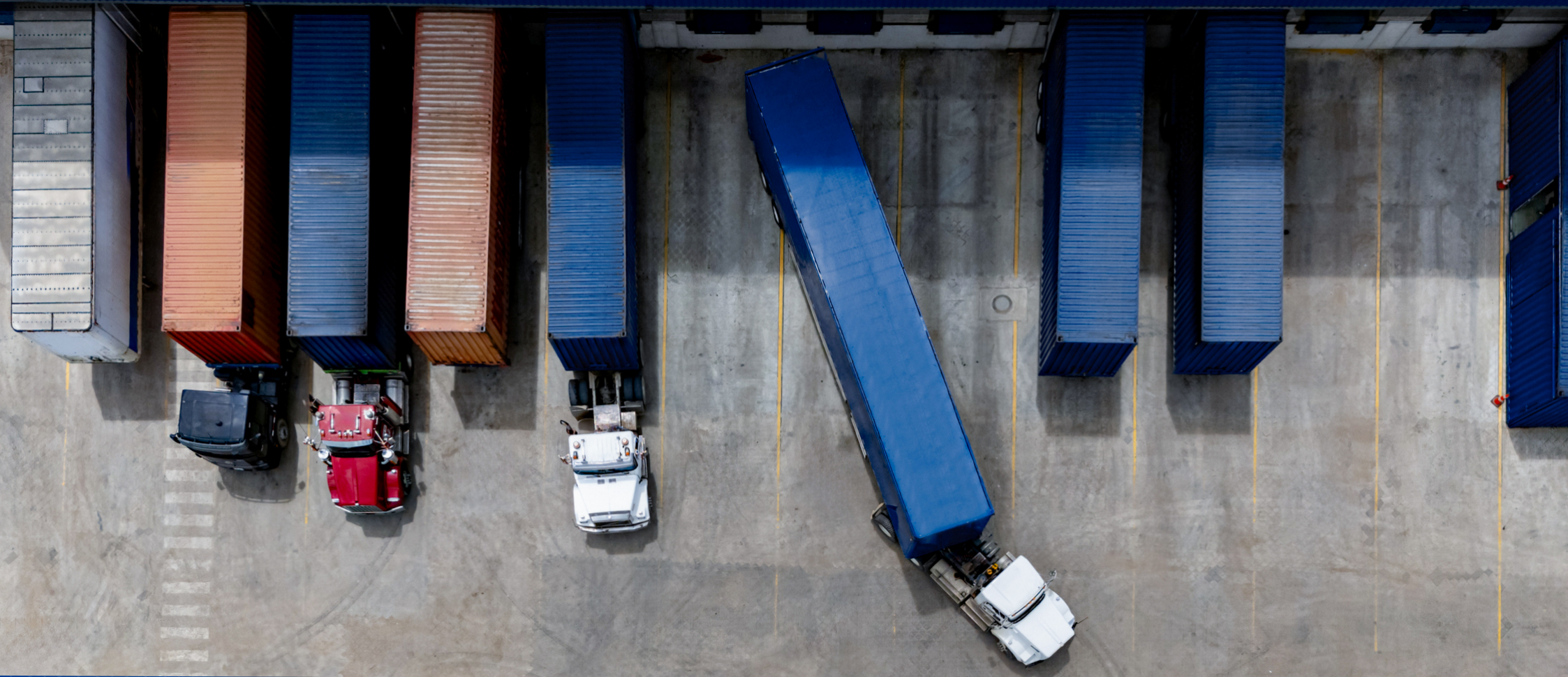




Market Report 8/2026



Company Capabilities

OIA Global is a leading provider of end-to-end [supply chain solutions](#), delivering resilient [logistics services](#) that adapt to a dynamic world. OIA's capabilities include road, ocean, air freight, [contract logistics](#), [project logistics](#), [customs brokerage](#), [packaging](#), [raw materials management](#), and [4PL](#) orchestration. By integrating automation and innovation, OIA transforms data into actionable intelligence, enabling smarter decisions and greater agility for customers across these [key industries](#): automotive and mobility, electronics, energy, healthcare, industrial, and retail and lifestyle.



1,200+

Employees

60+

Offices

30+

Countries

Case Studies

Contact OIA



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3.7% 

Air cargo traffic is forecast to grow 3.7% annually through 2045, outpacing trade and economic growth, and the global freighter fleet is expected to grow to >4,000 during the same timeframe.

- According to Boeing's figures, the company expects 2,930 global freighter deliveries, including newbuild and conversion aircraft, while 1,315 freighters will be retired.

63% 

Carriers Own More, Charter Less

At the outset of the pandemic (January 2020), ocean carriers chartered in most of their tonnage, giving them the flexibility to grow or shrink their fleets as needed. **This strategy has reversed itself as the 12 largest ocean carriers now own most of their operating capacity, about 63% of all slots, up from 43% in '20.**

- CMA CGM, PIL and Evergreen, all own a majority of their fleets now.
- Wan Hai has eliminated all chartered tonnage from its operations and now owns its entire 124-ship fleet.



Europe's Most Important Rivers Run Dry, Again

Two of Europe's most important inland waterways—the Danube River and Rhine River—have exceptionally low water levels, which continues to **disrupt** commercial shipping and restrict port operations.



The Danube in Romania fell to its lowest level since 1996.



The Rhine is the main water artery linking the Amsterdam-Rotterdam-Antwerp port complex with Germany, France and Switzerland.



The EU's introduction of new fees on low-value shipments triggered a **sharp contraction** in Asia-Europe freighter movements: down 14% in June, equivalent to about 18 fewer widebody freighters per day.



UK exports to the U.S. **dropped** by 10.3% (£6.8b) year-over-year.



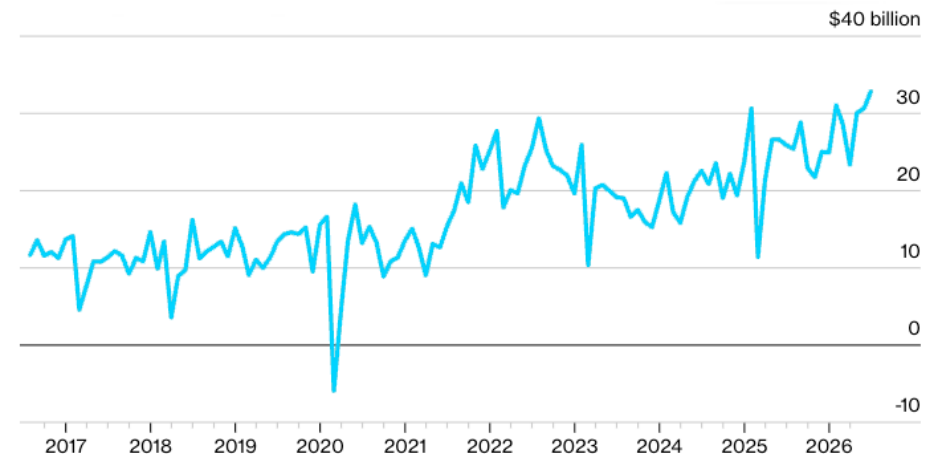
China-Europe shippers continue to divert freight through the Kazakhstan/Russia/Belarus rail corridor, with Eurasian rail traffic growing 50% this year. Rail routes through Eurasia typically take 12-15 days, whereas sea routes via the Suez Canal are currently averaging 40-45 days.



Russia has assembled an unprecedented fleet of oil tankers in the Arctic as it accelerates crude exports to Asia via the Northern Sea Route (NSR).

China's Trade Surplus with the EU Reaches New Record

June metrics were +27% year-over-year (YoY). China's surplus with Germany more than doubled while it plunged 81% with France.



Source: China's General Administration of Customs, Bloomberg.

Permanent Elevation in Asian Blank Sailings

Blank sailings are now a persistent, structural component of Asian maritime trade as ocean carriers are blanking up to 4.6x the amount of tonnage they're adding to the trade.

- The **Asia-Mediterranean** trade lane now [operates](#) with a withdrawn capacity floor of 580,484 TEUs, more than double the volume blanked in H1 '19.
- Withdrawn volume on the **Asia-NAEC** trade was 863,396 TEUs in the first half of this year, increasing from 273,725 TEUs in H1 '19.
- During the first half of 2026, **Asia-NAWC** and **Asia-North Europe** recorded capacity withdrawals of 1.04m TEUs and 1m TEUs, respectively.



HMM, the world's 8th-largest carrier, will spend approximately \$20b through 2030 to grow its fleet.

- Notably, HMM's purchasing strategy will [pivot away](#) from ultra-large container ships and instead focus on medium-sized and feeder vessels to develop a new hub-and-spoke network.
- HMM currently has 22% of its fleet on order

India's Ambitious Growth Plan Gains Momentum

OCEAN FREIGHT

Sarbananda Sonowal, India's Minister of Ports, Shipping, & Waterways, wants to [add](#) 62 new vessels to India's **domestic maritime fleet** in FY '26-'27, with the government providing a \$5.4B investment. Overall, the goal is to add 2.85M gross tons to India's fleet.

The **Bharat Container Shipping Line** (BCSL) is a joint venture aimed at reducing the country's 93% dependence on foreign tonnage.

India's government recently [approved](#) \$5.4b to support the **shipbuilding sector**, including subsidies and funds for infrastructure. India currently ranks 20th in the world, building <0.1% of the world's tonnage.

The **Bharat Maritime Insurance Pool** (BMI) is a domestic insurance program that will ensure Indian flagged or controlled vessels [have access](#) to affordable maritime insurance, even when transiting volatile routes.

AIR FREIGHT

India's government wants to move 10M tons of air cargo annually by 2030. The sector currently handles around 4M tons.

The country is [opening](#) 50+ new airport facilities

Air India has roughly 600 new aircraft on order

Market Trends: Mergers & Acquisitions



BACK TO TOP



Per a [press release](#), Canadian National (CN) will now [support](#) the pending Union Pacific (UP) and Norfolk Southern (NS) merger in exchange for expanded access to its network, particularly throughout the Midwest.



- CN gains access to shipper facilities where Class I railroad options would be reduced from 2-to-1 or 3-to-2, where commercially and operationally feasible;
- CN acquires Norfolk Southern's ownership interests in the Kansas City Terminal Railway Company (KCT) and the Terminal Railroad Association of St. Louis (TRRA);
- CN gains new access in the Midwest through overhead rights between Tuscola, Illinois, and East St. Louis, Illinois, and rights to serve customers between St. Louis, Missouri, and Kansas City, Missouri. For the first time, CN will have a footprint in the heart of Kansas City via UP's Neff Yard.

CN intends to [collaborate](#) throughout the Surface Transportation Board (STB) approval process to ensure that the agreement takes effect.

Recent Concessions

UP and NS will [expand](#) their Committed Gateway Pricing, preserving options for 3-to-2 shippers—those who will be served by two railroads rather than three after the merger—as well as 2-to-1 shippers. The revised plan should double the number of eligible shipments and includes bulk unit train shippers.

The merging railroads also offered to [provide](#) temporary access to other rail services in the event of service issues, and access to a rate relief process if the merger's benefits are not delivered on time.



CMA CGM Group [launched](#) a joint venture, United Ports LLC, with investment firm Stonepeak to [accelerate](#) the development of its various ocean container terminals.

- Fenix Marine Services (Los Angeles, USA)
- Port Liberty terminals (New York, Bayonne, USA)
- Santos terminals (Brazil)
- CSP Valencia and CSP Bilbao (Spain)
- Terminal Marítima del Guadalquivir (Spain)
- TTI Algeciras (Spain)
- Nhava Sheva Freeport Terminal (India)
- CMA CGM Kaohsiung Terminal (Taiwan)
- Gemalink (Cai Mep, Vietnam)



Deutsche Lufthansa AG and Air France-KLM [submitted](#) binding offers for a minority stake in TAP SA, setting up a competition between the two aviation groups. Portuguese state holding company Parpública now has 30 days to assess the proposals and submit a report to the government.

CMA retains a 75% ownership stake and full operational control while Stonepeak has a 25% stake via a \$2.4b [investment](#).

Pathways

Pathways is OIA Global's focused approach to strengthening key trade corridors and delivering smarter, more reliable solutions where our customers need them most. Each Pathway highlights a strategic route supported by data, expertise, and the ability to create meaningful impact on speed, visibility, and supply chain performance.



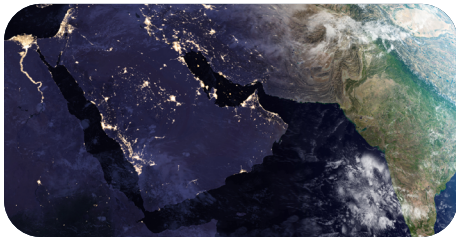
Atlantic

Connecting the **Americas and Europe** through high-value lanes designed for reliability, consistency, and competitive advantage.



Pacific

Strengthening the most competitive **U.S.–Asia** corridors by applying pricing intelligence, carrier performance insights, and a responsive market approach.



Eurasia

Enabling faster, smarter movement between **Asia and Europe** with flexible multimodal options, capacity management, and deep compliance expertise.



Southern

Unlocking emerging opportunities between **Asia and South America**.



DP World wants [to build](#) a new port and a container terminal on the United Arab Emirates' east coast near Fujairah [to reduce](#) dependence on Dubai's Jebel Ali hub and bypass the Strait of Hormuz. The new facilities will potentially [become](#) operational in 2027.

- DP World recently [signed](#) a 50-year agreement to develop two new terminals with the Fujairah Ports Authority, adding about 3M TEUs long-term.



Baltic Container Terminal (BCT) at the Port of Gdynia, Poland, [upgraded](#) its handling facilities—quay cranes, yard equipment, etc.—and can now handle some of the world's largest container ships.



The long-awaited [Gordie Howe International Bridge](#) is finally opening, adding another much-needed connection between Detroit and Windsor, Ontario. The 1.5-mile-long bridge [includes](#) modern ports of entry on both sides of the border [equipped](#) with advanced screening and border management technologies.



Once complete, India's Galathea Bay Port (GBP) will [compete](#) with Colombo, Port Klang, and Singapore for transshipment cargo:

Situated on the southern tip of Great Nicobar Island, a Delhi-controlled territory 200km northwest of the Malacca Strait's northern entrance, GBP will be well positioned to move cargo to both Indian coasts. Phase one of construction is expected to start in 2028.



HMM's Recent Terminal Investments



HMM will [develop](#) and operate a new port complex at India's Vadhvan, about 62 miles north of Mumbai, with a design capacity of 23m TEUs.



HMM will [spend](#) \$135m over the next two years to increase the handling capacity of Washington United Terminals (WUT) at the Port of Tacoma by about 50%. The upgrades will [raise](#) WUT's annual capacity from approximately 590,000 TEUs to 880,000 TEUs.



Savannah, Georgia, USA

On July 16th, Port of Savannah opened the Brampton Road Connector, a new four-lane highway linking Garden City Terminal's Gate 3 directly to the interstate system.

- Truck drivers now have a more streamlined route to inland markets, and it removes rail crossings and truck traffic from local neighborhoods.

Georgia Ports Authority (GPA) recently passed the halfway mark on its \$1.6B expansion of Savannah's ocean terminal. Redevelopment of the 200-acre facility is expected to increase Savannah's annual container capacity from 200,000 TEUs to 1.75M TEUs.

- The upgraded yard is expected to partially open in late 2027, with full completion by the end of 2028.

These projects are just a small part of Georgia Ports Authority's (GPA) \$5b master plan to become the leading gateway in the U.S. East.



U.S. CBP Updates Rules for Post-Summary Corrections

Post Summary Correction (PSC) procedures can affect duty corrections, valuation updates, classification changes, and compliance workflows. For customs brokers and importers, this is important because PSCs are the primary mechanism for correcting entry summaries after filing but before liquidation.

- Updated eligibility rules for when a PSC can be filed.
- Changes to how PSCs interact with protests, liquidations, and other post-entry actions.
- Expanded validation and automation within ACE.
- New processing logic intended to improve accuracy and reduce conflicting post-entry filings.



President Trump [signed](#) an executive order, [Securing America's Defense Supply Chains and Ensuring Domestic Acquisition of Critical Materials](#), which will require the U.S. Department of Defense and its contractors to map out the supply chain, screening suppliers and subcontractors for financial, manufacturing, and supply risk, as well as foreign ownership, control or influence.

[Learn More](#)

U.S. Strengthens Customs Capabilities & Enforcement

The U.S. is preparing new federal customs regulations, increasing restrictions on foreign importers, and establishing higher penalty thresholds for those who are noncompliant. A recent [executive order](#) will [strengthen](#) U.S. Customs and Border Protection's (CBP) capabilities in several ways, with an emphasis on the importer of record (IOR).

- Liquidating damage claims against bonds for noncompliance
- Restricting in-bond utilization
- Increased audits
- Imposing maximum penalties for brokers who fail to conduct due diligence, repeatedly represent noncompliant clients, or fail to cooperate in a timely manner with CBP.

[Learn More](#)

EU Changes Small Parcels Rules

On July 1st, the European Union [made significant changes to its customs rules for low-value goods, removing the duty-free exemption.](#)

- For parcels valued at €150 or less, a flat €3 duty will apply per item within a shipment. If a package contains multiple items from different product categories, the duty applies to each distinct category.
- The flat fee is a temporary regime that's applicable until July 1st, 2028, pending future implementation of broader customs reforms.

[More Information](#)

OIA's Recent Acquisitions



Cargo Services, Inc. (CSI), is an established international freight forwarding and customs brokerage firm headquartered in Indianapolis, Indiana. The company has longstanding customer relationships across key manufacturing and industrial sectors.

"At OIA, service is everything—and what stood out about Cargo Services is that they operate the same way. You can see it in how long their customers have been with them. Connecting that with OIA's global network is going to create real value for customers on both sides."

- Mabel Rodriguez, Managing Director, Americas

[Learn More](#)



About Freight Worldwide, (AFW) is a premier freight forwarding and customs clearance provider headquartered in Auckland, New Zealand. With more than two decades of delivering precision logistics with a personal touch, AFW has earned long-standing customer relationships across the industrial, automotive, consumer, and pharmaceutical sectors.

"This acquisition is an important milestone for our presence in New Zealand and a testament to the strength of our regional strategy. Dave and his team have built a business that mirrors everything we stand for: exceptional service, trusted customer relationships, and an unwavering commitment to getting it right."

-Jeff Barrie, Chief Executive Officer of OIA Global

[Learn More](#)

Los Angeles/Long Beach Leading in ESG Initiatives

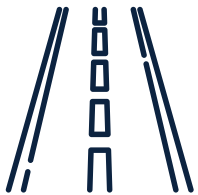
The Ports of Los Angeles and Long Beach are incentivizing drayage truckers to adopt electric trucks by offsetting their costs.

- The median price of a 2025 model year battery-electric Class 8 tractor in the U.S. was \$411,200, while a diesel equivalent cost \$172,500.

Different partnerships aim to improve supply chain efficiency while also reducing air pollution and greenhouse gas emissions.

- Authorizing \$58M to expand its zero-emissions cargo handling equipment and replace diesel-powered harbor craft with lower-emissions ships.
- Establishing a “green trucking corridor” between Los Angeles and California’s Central Valley.

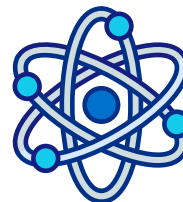
LA/LB hopes to become the world’s first zero-emissions port.



Following industry feedback, the U.S. Environmental Protection Agency (EPA) **plans to revise** its nitrogen oxide tailpipe emissions regulations by rolling back warranty requirements for new heavy-duty trucks and softening compliance standards.



U.S. Working to Make Nuclear-Powered Vessels Commercially Viable



The U.S. Department of Transportation's Maritime Administration (MARAD) is **working** to make nuclear-powered merchant ships commercially viable. The U.S. wants **to build** a complete commercial ecosystem for **Small Modular Nuclear Reactors** (SMR) within commercial shipping and is actively soliciting information about the regulatory, shipyard, insurance, and port frameworks needed to make it happen.

The Port of Long Beach has become the first U.S. seaport to formalize a partnership with MARAD and test SMRs for commercial vessels and other potential uses. The Coast Guard, the Department of Energy and the Nuclear Regulatory Commission will **collaborate** to define operational protocols, safety standards and inspection processes needed to support the safe arrival and servicing of SMR-powered vessels at U.S. ports, as well as to develop and share other best practices.



The European Free Trade Association recently launched a new digital Free Trade Dashboard, designed to help companies identify tariff savings and check how effectively they are using free trade agreements. Tariff preferences are not applied automatically, so businesses should review their trade flows, origin documentation, and customs processes to ensure they are fully benefiting from available agreements and not incurring unnecessary duties.

Shippers are encouraged to explore the tool and assess potential savings by country, product, and trade agreement.

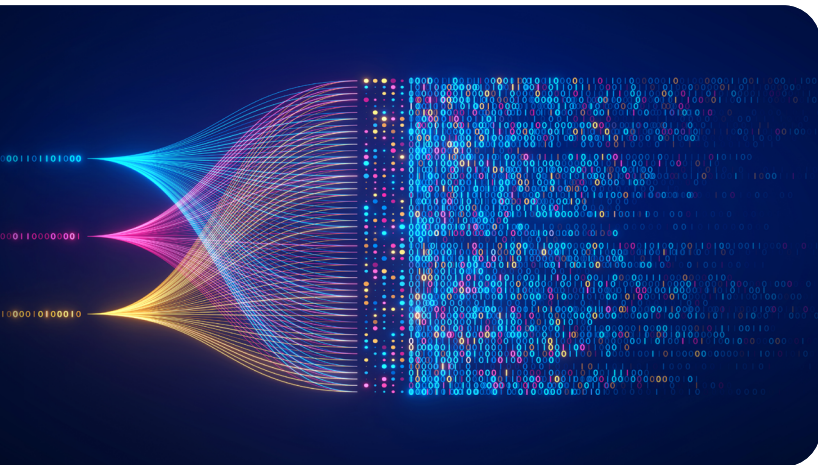
More Information



Digital Shipbuilding Tools Currently In Development

HD Hyundai's shipbuilding business signed an agreement with Siemens Digital Industries Software to create a platform that will digitally connect the entire maritime shipbuilding process. The tool will cover the full spectrum: vessel design and production to supply chain management, quality control and maintenance, and sea trials, all **combined** into a 3D-model-based data environment.

With consistent information across every stage of the process, shipyards will be able to transmit design changes and real-time updates directly to the production floor and supply chain stakeholders, enabling informed decision-making and helping to prevent schedule delays or quality issues.



Nvidia, a leading AI and computer technology company, and Kawasaki Heavy Industries announced a joint effort to **build** a “next-generation digital shipyard” at Kawasaki’s Sakaide Works in Japan. Co-development initiatives include AI-powered robots for shipbuilding tasks such as welding, painting, inspection, and material handling.

- Nvidia will contribute its AI and simulation stack, including products for applications in digital twins, robotics, vision/AI, and edge AI, which applies AI models and algorithms directly to devices such as sensors, cameras, robots, vehicles, or industrial controllers.
- Kawasaki will contribute decades of shipbuilding data, production knowledge, and its own robotics capabilities.



OIA Global is a leading provider of end-to-end supply chain solutions, delivering resilient logistics services that adapt to a dynamic world. Our company's mission is to deliver peace of mind. Through proven solutions and exceptional service, OIA goes above and beyond to find the path to success for every customer.

OIA's capabilities extend beyond traditional transportation management to include comprehensive road, ocean, and air services, as well as contract logistics, project logistics, and customs brokerage. We also offer innovative packaging solutions, raw materials management, and 4PL supply chain orchestration.

By integrating automation, innovation, and AI into daily operations, OIA transforms data into actionable intelligence, enabling smarter decision-making and providing customers with better visibility and agility. OIA maintains expertise in several key industries: automotive and mobility, electronics, energy, healthcare, industrial, and retail and lifestyle, but also provides services in many others.

Founded and headquartered in Portland, Oregon, USA, the company now operates in 30+ countries with more than 1,200 employees across 60+ offices.



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