



# Market Report 11/2025



# 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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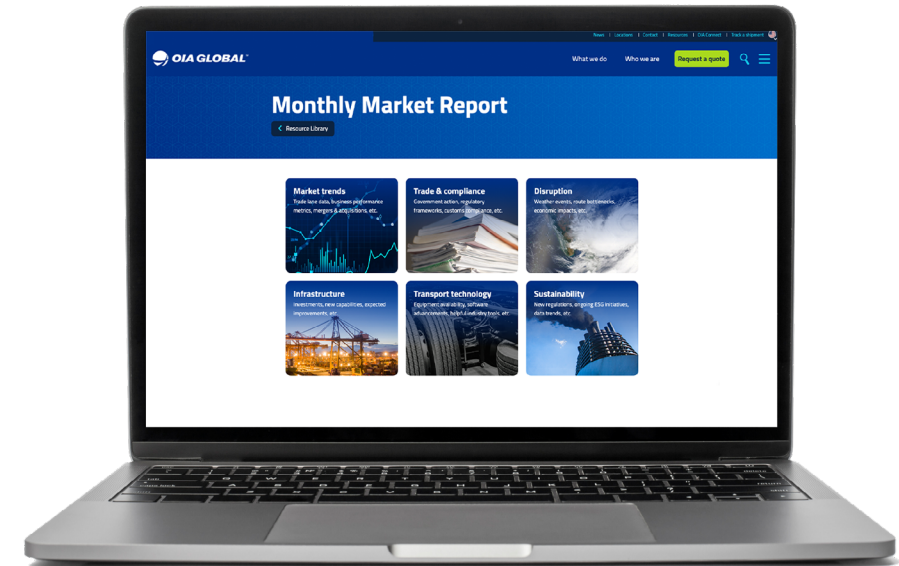
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# Market Trends



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## 3,300+

**Almost 3,300 freighter aircraft will be added to the air cargo market over the next 20 years.** Freight capacity is forecast to grow at 3.5% annually while the freighter fleet is predicted to grow at a Compound Annual Growth Rate (CAGR) of 2.5%, reaching 4,100 by 2044.

- Of the approximately 3,300 freighters, roughly 32% will be newbuild aircraft, led by the new generation Airbus A350F and the Boeing 777-8F.

## -6.6%

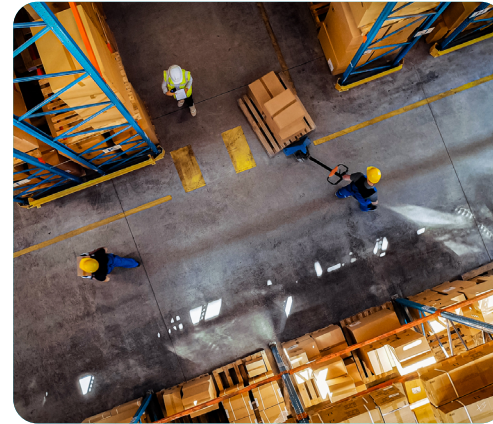
The ten largest U.S. ports **recorded** a 6.6% year-over-year (YoY) decrease in inbound container volume in September '25, marking a sharp reversal from earlier months.

## 8m GT

In September, the Singapore Registry of Ships (SRS) **added** >8m gross tons of vessels, adding 94 ships as owners hoped to avoid fees tied to China.



**Less-than-container-load (LCL) ocean shipping remains a cost-effective alternative in the current U.S. import landscape, where tariffs have increased and airfreight rates remain high.** LCL options are particularly advantageous for businesses with fluctuating inventory, as it offers a balance of affordability, flexibility, and reliability without the inefficiencies of underutilized FCL space or the high costs of air transport.



## Foreign Trade Zones vs. Bonded Warehousing

U.S. importers are increasingly **using** foreign trade zones (FTZs) and bonded warehouses to manage costs and preserve flexibility. **Not sure what's best for your business?** Read this [informative article](#).

**Read now**

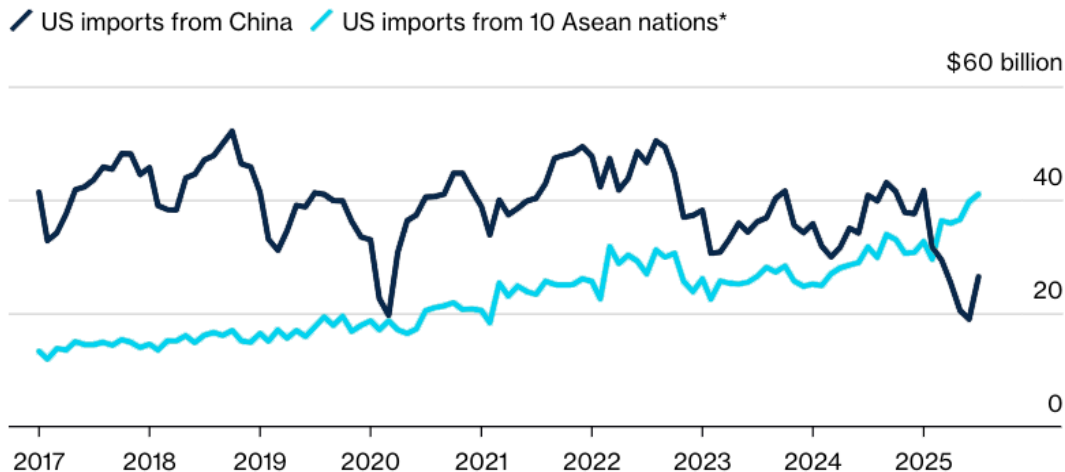
**“** This year's peak season has come and gone, largely due to retailers frontloading imports ahead of reciprocal tariffs taking effect. **”**

- Jonathan Gold, National Retail Federation (NRF)  
Vice President for Supply Chain & Customs Policy

## Southeast Asia an Increasingly Important Source of Goods for U.S.

China [expanded](#) the China-Asean Free Trade Area (CAFTA 3.0) with a group of key Southeast Asian nations, deepening its economic ties in the region. Simultaneously, the U.S. is also [working](#) on new framework trade agreements with Malaysia, Cambodia, Thailand and Vietnam.

**Imports from Association of Southeast Asian Nations (ASEAN) surpassed China after the first tariffs hit in 2025.**



Source: U.S. Census Bureau via [Bloomberg](#). Note: Excludes Timor Leste.



## Transpacific Trade Shifts Amidst Tariff Uncertainty

From April through September '25, U.S. imports from China were at levels not seen since 2013, [down](#) 15% year-over-year (YoY), equating to 875,000 fewer TEUs.

- U.S. laden imports from Vietnam jumped nearly 26% in the same six-month period, with Vietnamese volumes accounted for 16.8% of all inbound traffic into the U.S.
- India, Thailand, Indonesia, Malaysia and Cambodia all gained market share as well.



## India's Flagship Carrier: the Bharat Container Shipping Line

India is **launching its first national container shipping line, Bharat Container Shipping Line (BCSL), in hopes of reducing its dependence on foreign carriers and boosting control over its seaborne trade.**

- Initially focused on regional shipping routes throughout Asia, West Asia, and the Red Sea, India's goal is to expand Bharat's coverage and eventually carry at least 20% of its cargo on its own ships.
- The new line starts with a fleet of 51 container ships and is backed by \$6.9b of investment.

The domestic flag container carrier will operate under a public/private partnership in collaboration with the country's ports and supported by India's [Maritime Development Fund](#).



**Latin America's fragmented regulatory environment continues to limit intra-regional trade,** which accounts for only 14% of total goods trade, far below the levels seen in more integrated regions like the European Union (EU).

- Each country in Latin America maintains its own customs procedures, documentation standards, and tariff regimes, resulting in a highly decentralized trade environment.
- Shippers that succeed here often invest in digital documentation tools and build strong relationships with local authorities to streamline customs clearances and reduce delays.



# New Horizons in Oceania

**OIA Global has expanded its presence into the Oceania region, enhancing overall network connectivity and expanding capabilities throughout Southeast Asia and the Pacific.**

OIA's operations in Oceania now include both **Australia** (Brisbane, Melbourne, Sydney) and **New Zealand** (Auckland), offering seamless multimodal connectivity to OIA's preexisting offices in these key global trade hubs: Bangkok, Busan, Chennai, Chicago, Ho Chi Minh City, Houston, Jakarta, Los Angeles, New York, Rotterdam, Shanghai, Shenzhen, and Singapore.

**These changes demonstrate the growing power of OIA's expansive network and reiterate OIA's commitment to shared customer success.**

[More information](#)

## China's Expansive Dominance in Global Ports

China now [exerts](#) variable degrees of influence over 90+ deepwater ports overseas, with many strategic projects in the pipeline.

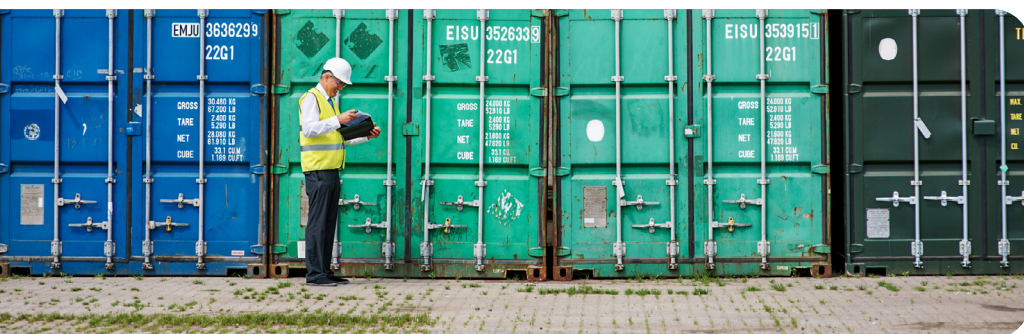
### State-owned Enterprises



### Private Companies



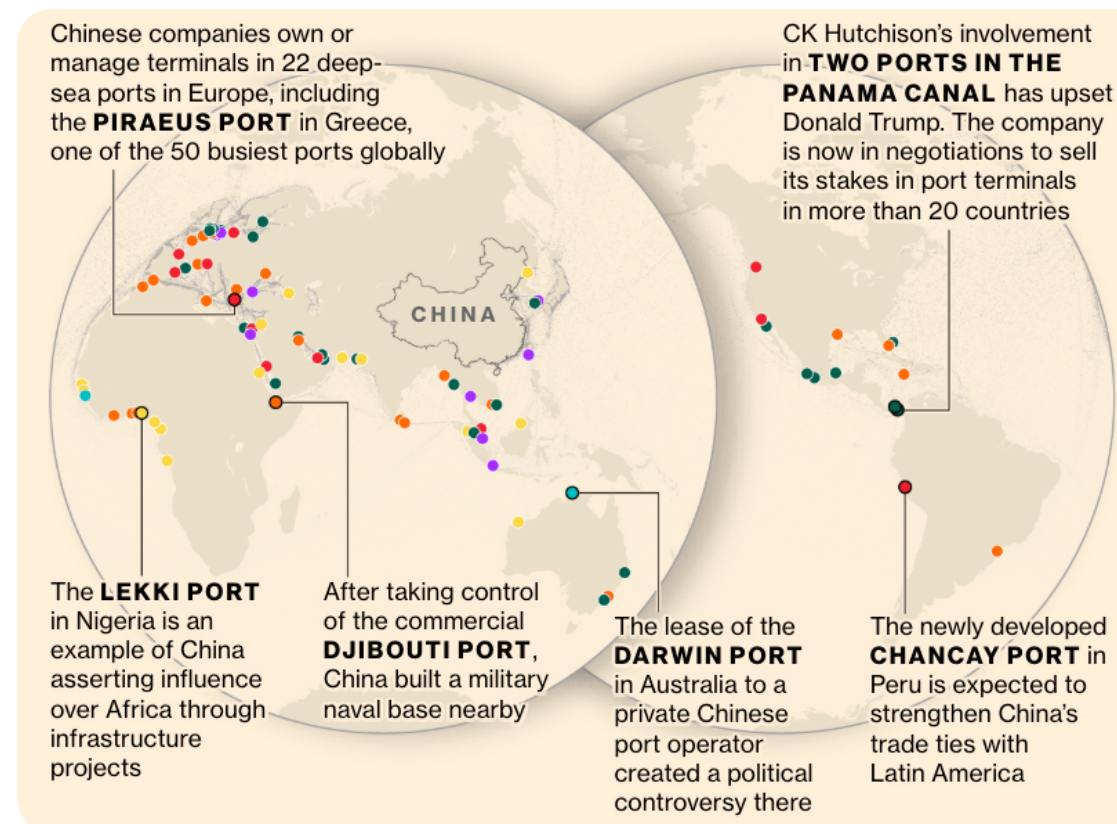
### Joint Ventures



*Note: Chinese involvement in ports may include an ownership stake in a port or a terminal or concessions to operate it. Involvement may include one or more terminals and is as of Oct. 6. China Merchants Port includes interests held through Terminal Link, a joint venture with the French company CMA CGM.*

*Sources: Analysis by Isaac Kardon, Carnegie Endowment for International Peace; Natural Earth; IMF Global Commercial Shipping Traffic Density (Jan. 2015–Feb. 2021), via [Bloomberg](#).*

Deep-sea container ports outside of mainland China and Hong Kong where Chinese companies are involved.





**Qatar approved the long-awaited plan to build a 100km long railway from Doha to Abu Semra on the border with Saudi Arabia.** Qatar's first main line railway would create many key regional connections:

- Connecting the planned section of the Gulf Railway running from Damman south to Ghuwaifat on the border with the United Arab Emirates (UAE).
- Connections with the existing Etihad Rail network to Abu Dhabi, Dubai, and Fujairah.
- Bringing freight traffic off the Saudi line to Hamad Port and Mesaieed Industrial City south of Doha.



CMA CGM and Red Sea Gateway Terminal (RSGT) are **planning** to build and **operate** Terminal 4 at Jeddah Islamic Port. The SAR \$1.7b (USD \$450m) investment **will create** a 2.6m TEU facility, providing advanced handling equipment and next-generation digital and sustainability capabilities.



Kazakhstan officially **opened** a second track on the 836km Dostyk-Moiynty rail line, which will boost freight capacity fivefold and is a strategic key component in the growing freight route between Kazakhstan and China.



The Panama Canal Authority (ACP) **launched** a year-long process to select developers to design, build and operate two new ocean terminals at Corozal on the Pacific side and Colón on the Atlantic. The terminals will have a 5m TEU combined capacity and focus on transshipments.

- The terminals are part of an \$8.5b, 10-year investment plan **announced** by ACP Administrator Ricaurte Vásquez Morales on Sept. 16<sup>th</sup>.



CMA CGM is **investing** in a joint venture that will be responsible for the management and development of **a new transshipment terminal at the Port of Nador West Med in Morocco, located <250 miles from the Strait of Gibraltar.** The 1.8m TEU terminal **will become** operational in 2027 and feature eight ship-to-shore (STS) cranes, a 900-meter quay, and an 18-meter draught.



## India Receives Investments from DP World & Maersk

- DP World **pledged** to invest an additional \$5b (£3.8bn) to strengthen multimodal connectivity across its supply chain network in India, in support of both domestic and international trade.
- Maersk's APM Terminals has **planned** >\$2b in investments as it intends to significantly expand its operational footprint in India through port infrastructure, vessel reflagging, and strategic partnerships.



The Alabama Port Authority and APM Terminals (APMT) Mobile **announced** a \$131m project **to build a new 1,300-foot (400-metre) container berth at the Port of Mobile**. The expansion will increase berth capacity by 50%, allowing the terminal to handle three ultra-large container vessels simultaneously.



**The Vincent Thomas Bridge at the entry to Los Angeles harbor will be re-decked in early '26 to raise the clearance from 185' to 211'**, allowing super post-Panamax container ships to reach the three terminals on the land side of the bridge: Yusen Terminals, TraPac and West Basin.

- The bridge currently handles 53,000 vehicles a day, including about 3,400 heavy-duty trucks.



**The Georgia Ports Authority (GPA) approved \$614m for the first phase of improvements at the Port of Savannah's Ocean Terminal, including the container yard, berth, expanded truck gates and ramps, and other key infrastructure.**

- The first phase is expected to be completed in 2027
- A second phase will be completed in the second half of 2028

With a total investment of \$1.54b, the 200-acre site is expected to handle two large container ships simultaneously with a nominal capacity of 2m TEUs per year.



# Recent Company News

## Brandon Ruggles Appointed as Chief Operating Officer

In this new role, Ruggles will lead OIA's Freight Forwarding business segment and Global Business Services, driving greater alignment between commercial priorities and operational execution while still keeping customers at the center of OIA's strategy.

[Full story](#)

## Legal Team Honored with Prestigious Award

OIA's Legal Team has been recognized by the OnCon Icon Awards in the Legal category, earning a place among this year's Top 50 Corporate Counsel Teams. The OnCon Icon Awards are peer-voted honors that celebrate in-house legal teams demonstrating exceptional impact, innovation, and leadership within their organizations.

[Read now](#)

## Todd Earls Named Chief Supply Chain Officer

Earls will lead OIA's Supply Chain Management (SCM) business segment, which includes packaging solutions, raw material management, and 4PL orchestration. Todd brings more than 28 years of experience in developing and implementing enterprise technology solutions at global organizations.

[Learn more](#)

## IMO Postpones Sweeping Decarbonization Plan for One Year

Member states of the International Maritime Organization (IMO) voted to **postpone the adoption of far-reaching decarbonization plans (the "Net Zero Framework") for one year**, with the U.S., Saudia Arabia, and Russia leading efforts to **derail** the adoption of such measures. The U.S. even **threatened** to target IMO member states' ships if they supported the plan.



*"On one side, the EU's regional approach continues to undermine the global system it claims to support. On the other, the United States and Saudi Arabia, driven by their short-term energy and petro-economic interests, have blocked progress towards a credible global framework."*

- Dr Martin Kröger, CEO of the German Shipowners' Association

**Honeywell is launching a new technology that can convert forest and agricultural waste to a lower carbon fuel that could directly replace the carbon-intensive fuel oil used by large ships**, helping the maritime and other heavy industries decarbonize. This "biocrude upgrading technology" can use biomass, which includes agricultural waste, to create a range of renewable fuels including sustainable aviation fuel, gasoline, diesel and marine fuel.

Maersk is **retrofitting** 200+ time-chartered vessels in collaboration with 50+ shipowners, targeting lower emissions, reduced fuel costs, and enhanced cargo capacity across its fleet. This large-scale initiative impacts Maersk's medium and long-term chartered fleet, which accounts for a significant share of its operations and fuel consumption.



**Carriers are increasingly making commitments to LNG-fueled container ships over other alternative fuels like methanol.**

- The number of LNG-fueled container ships on order has grown from 194 in late '23 to 362 as of October '25.
- The percentage of vessels on order capable of running on LNG grew from 23% to 40% during the same period, while the percentage of methanol-powered ships was unchanged at 15%.

For example, HMM recently **spent** \$2.81b on new Very Large Crude Carriers (VLCCs), all LNG-dual fueled.



The European Commission [announced major updates to the Dual-Use Export Control List](#), tightening oversight of sensitive technologies, including quantum technologies, semiconductor equipment, advanced computing devices, and biotech tools.

- Companies should [review](#) the new technical definitions, assess their portfolios, and update their compliance practices to prepare for these licensing and reporting obligations.



Europe's new Entry-Exit System (EES) will begin [registering biometric photos and fingerprints at airports and border crossings from people leaving or arriving in the bloc](#). EES will gradually phase in over six months and will enable officials to cross-check information about people's immigration status.



Registered customs representatives are [no longer permitted to use their own Value-Added Tax \(VAT\) number to act as a one-off fiscal representative for imports from companies not established in the European Union](#). Therefore, this abolition requires non-European businesses to:

- Register for VAT in France
- File their own VAT returns

Affected businesses should reassess import flows, prepare for VAT compliance, and [evaluate](#) alternative entry points like the Netherlands or Belgium.



Recently enacted U.S. tariffs have reduced cargo flows from India. Shippers exporting from India should expect turbulence until the U.S. Supreme Court [completes](#) its review of the lower-court ruling related to tariff authority in November '25.



A new bill introduced in the United States Senate would [expedite](#) the federal approval process for LNG exports. The proposed [Natural Gas Export Expansion Act](#) would amend the Natural Gas Act to treat export applications as non-free trade agreement (non-FTA) countries the same as those to FTA nations, streamlining the permit approval process.

## U.S. & China Reach Trade Consensus, Deescalating Tensions

The United States and China reached a consensus agreement that will lower tariffs on imports from China to 10%, down from 20%, effective immediately.

- A variety of Section 301 and Section 232 tariffs remain in place, and goods from China will still face a duty burden of roughly 47%, according to U.S. Trade Representative Jamieson Greer.
- China's Ministry of Commerce confirmed the U.S. would further extend its pause on reciprocal tariffs for another year.

Additionally, the U.S. Trade Representative (USTR) will pause any measures resulting from its Section 301 investigation into China's maritime and shipbuilding dominance for a year, while China will also suspend its countermeasures against the U.S. for one year. **Both countries have suspended costly fees targeting each other's ships docking at their respective ports as negotiations for a new bilateral trade agreement continue.**



## U.S. Enacts Tariffs on Medium- & Heavy-Duty Trucks

The Trump Administration has imposed a 25% tariff on imported medium- and heavy-duty trucks, effective November 1<sup>st</sup>. The new tariffs affect Class 3 to Class 8 vehicles, such as large pick-up trucks, moving trucks, cargo trucks, dump trucks, and tractors for 18-wheelers.

According to a [White House Fact Sheet](#), the proclamation [does mitigate](#) some elements for trucks that are compliant with the United States-Mexico-Canada Agreement (USMCA).

- For trucks that qualify for preferential tariff treatment under the USMCA, the tariff will only apply to the value of the non-U.S. content in the vehicle.
- For trucks that do not qualify for preferential tariff treatment under the USMCA, the tariff will apply to the full value of the vehicle.



The tariffs also [apply](#) to key truck parts, including engines, transmissions, tires, and chassis.

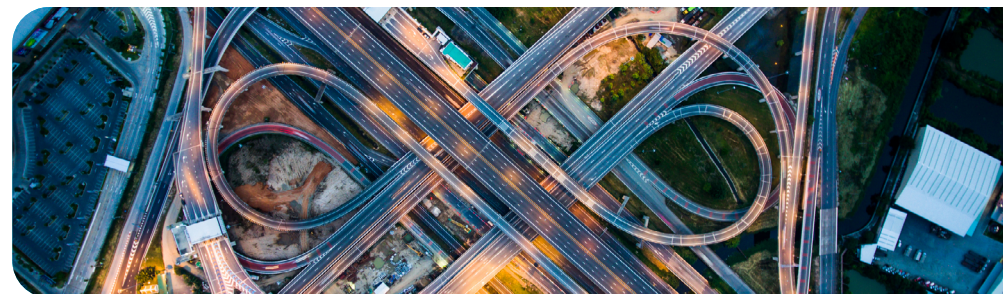
- The proposed duties could [squeeze](#) smaller carriers and complicate fleet replacement cycles already slowed by excess capacity and high financing costs.



## Automation Reshapes Trucking, Driving Efficiency & New Fraud Risks

Technology is changing how carriers, brokers, and shippers interact, and there's growing demand for both real-time shipment tracking and the automation of several interactions.

- Real-time shipment tracking has become a key industry expectation, supported by Electronic Logging Device (ELD) mandates and mobile app adoption.
- The industry faces increased risks of cargo theft and fraud, prompting the development of identity verification and security technologies.



**Cathay Cargo is the first major air carrier to introduce real-time, API-linked customs clearances**, giving users status updates from customs authorities, including Europe's ICS2 Import Control System, the U.S., Canada and UAE. Previously, accessing this information was reliant on manual updates from ground-handling agents.

In an effort to enhance the safety of alternative power systems, **Lloyd's Register (LR) released updated guidance for the installation of fuel cells on ships, incorporating recent regulatory updates and technical developments**. The changes provide two safety concepts for fuel cell spaces: emergency shutdown-protected fuel cell spaces and gas-safe fuel cell spaces.

- The gas-safe fuel cell space concept enables installation of fuel cell power systems within conventional machinery spaces and simplifies retrofitting, while ensuring compliance with fire protection, explosion prevention, and hazardous zone requirements.

**Hanwha Ocean successfully completed the world's first ship-to-ship (STS) transfer of liquefied natural gas (LNG) between vessels undergoing sea trials**. The innovative procedure eliminates the traditional requirement for LNG carriers to load fuel from terminals before conducting gas trials and then return the remaining fuel afterward. **Instead, vessels can now transfer LNG directly between ships at sea.**



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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