



# Market Report 8/2025



# Company Capabilities

Our mission is to deliver peace of mind. In the ever-evolving global supply chain, we find a way when others can't: creating more personalized, sustainable, and resilient solutions to the challenges that our customers face.

OIA Global provides end-to-end supply chain management, including **3PL** services, **4PL** supply chain orchestration, **contract logistics** (warehousing and distribution), innovative **packaging solutions**, **raw materials management**, and several advanced **technology solutions** for shipment visibility and inventory management.

By leveraging these comprehensive and scalable solutions, exceptional customer support, and a truly global network, we go above and beyond to find the path to success for every customer.

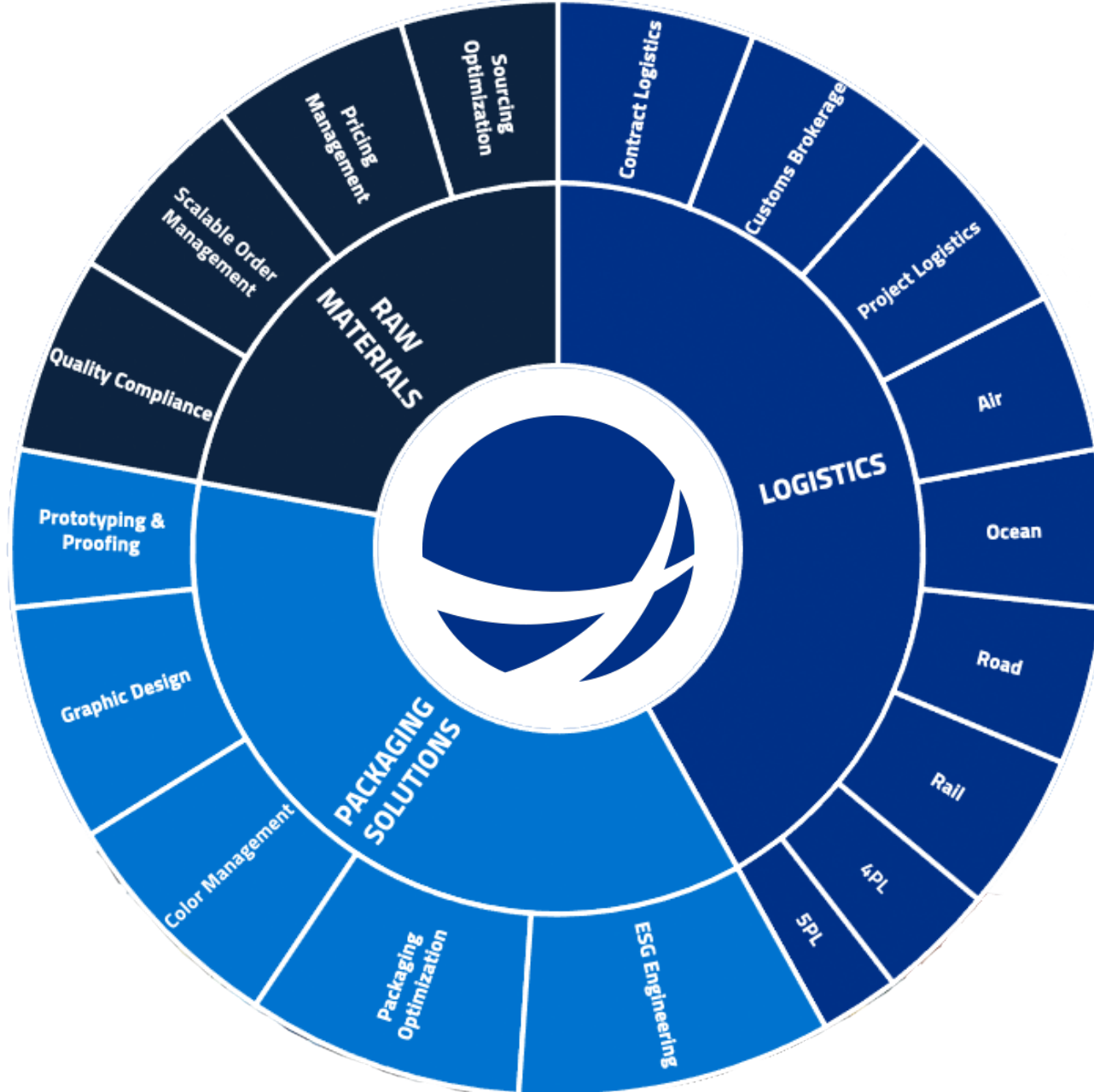


**1,100+**  
Employees

**60+**  
Offices

**30+**  
Countries

**Case Studies**



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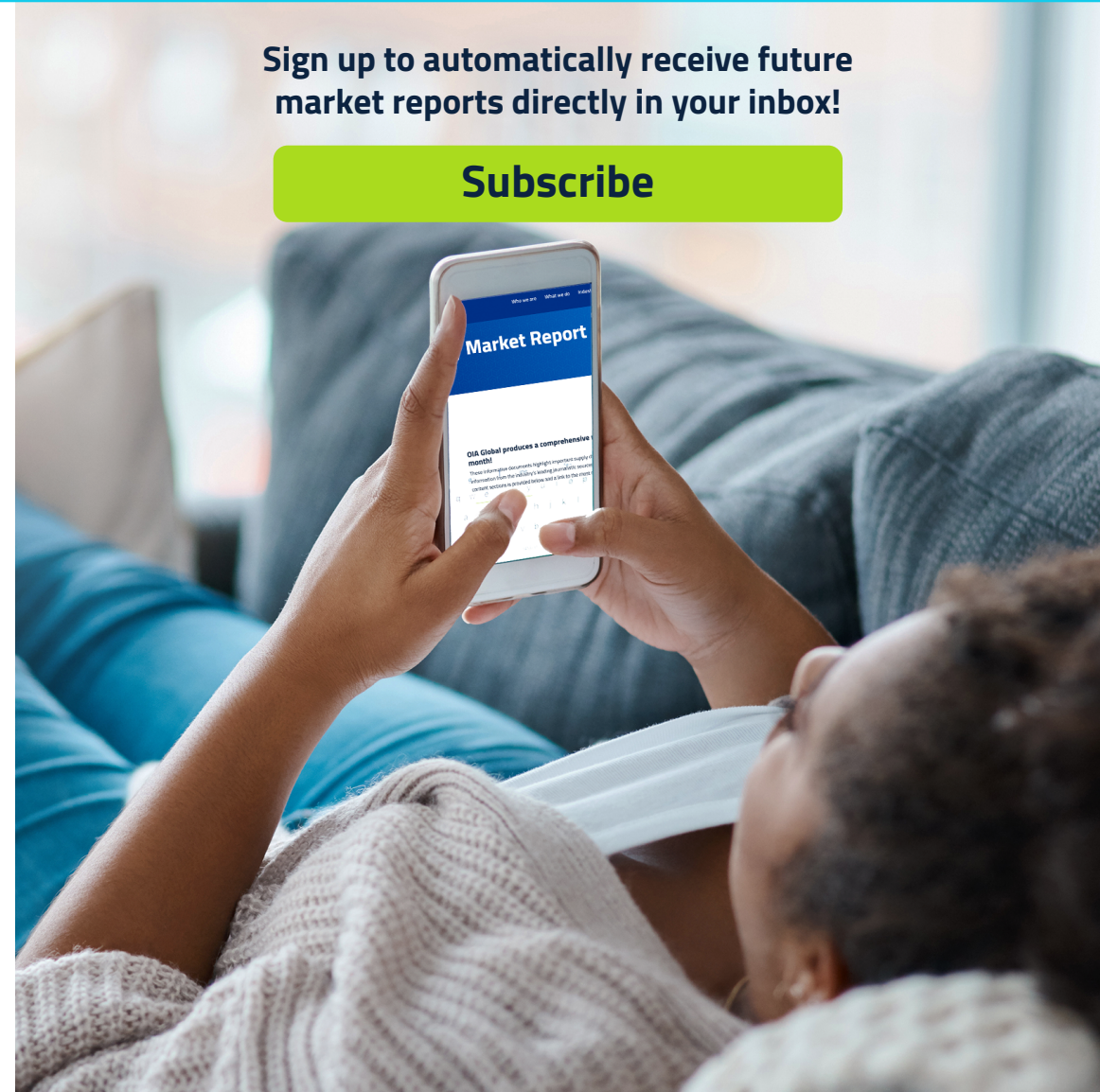


### Note:

All monetary figures are shown in United States Dollars (USD) unless stated otherwise.

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>40%

Mexico's exports to the U.S. have risen >40% during the past five years, driven by nearshoring gains in electronics, medical devices, and cars amidst U.S./China trade tensions.

- Chinese imports into Mexico nearly **doubled** over the last decade (roughly \$130b), while Mexican exports back total <\$10b, leaving a \$120b bilateral trade deficit.



The U.S. warehousing vacancy rate **climbed** to its highest level in over a decade during Q2 '25 as many companies **postponed** leasing or purchasing new space amidst an ever-evolving trade policy environment.

- Many shippers are **shifting** away from just-in-time (JIT) production models and opting for more flexible storage that's closer to consumption markets.



\$12.5b

The logistics market in Vietnam's Mekong Delta is **projected** to grow from \$7.8b in 2025 to \$12.5b by 2030. Investments in road, rail, and inland waterway infrastructure should unlock more efficient freight routes between production hubs and international export markets.



In June, the U.S. trade deficit **narrowed** to its lowest level since September 2023 as companies scaled back imports, particularly consumer goods, which fell to levels not seen since September '20.



Argentina's government plans to **privatize** its state-owned rail freight company Belgrano Freight & Logistics as it restructures the country's rail freight sector, transitioning towards an open-access model with a target completion date of July 2026.



Malaysia's two biggest airlines, AirAsia and Malaysia Airlines, **signed** deals with Airbus worth >\$20b to purchase new aircraft.

- AirAsia tentatively will buy up to 70 single-aisle jets
- Malaysia Airlines ordered 20 more A330neo widebody planes



The last-mile drone delivery market is **expected** to grow 27.5% year-over-year (YoY) in the next decade, **growing** from \$253.8m in 2022 to \$2.8b by 2032.



Container ports are **facing** a deluge of cyber-attacks from state-supported hackers—Russian GRU-linked APT28, Iranian groups like APT35 and MuddyWater, and Chinese operations such as Mustang Panda—according to a **policy brief** from NATO's Cooperative Cyber Defense Centre of Excellence (CCDCOE). These hacking groups are actively targeting port systems, including vessel traffic services, fuel terminals, and access control terminals.



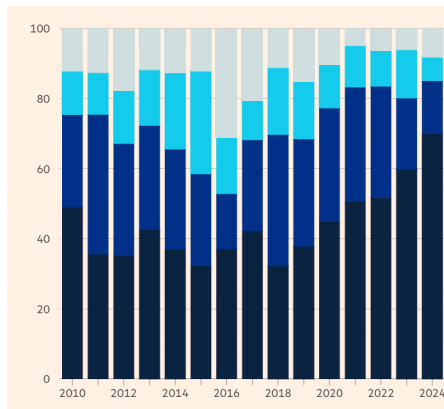
## Japan Invests in Shipbuilding Capabilities

Japan is working to revitalize its shipbuilding industry through consolidations and a proposed \$7b national fund. This public/private fund would modernize facilities and build national shipyards that the government can then lease to private groups.

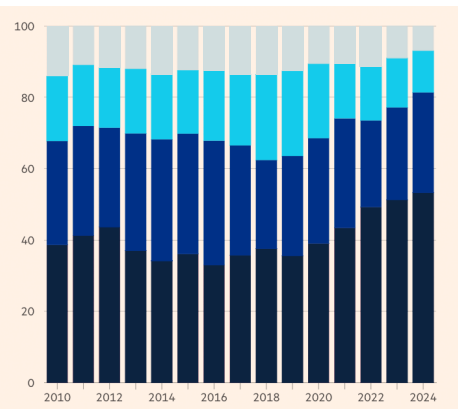


China dominated global shipbuilding in 2024, as shown by market share (%), in compensated gross tonnage.

By Orders



By Deliveries



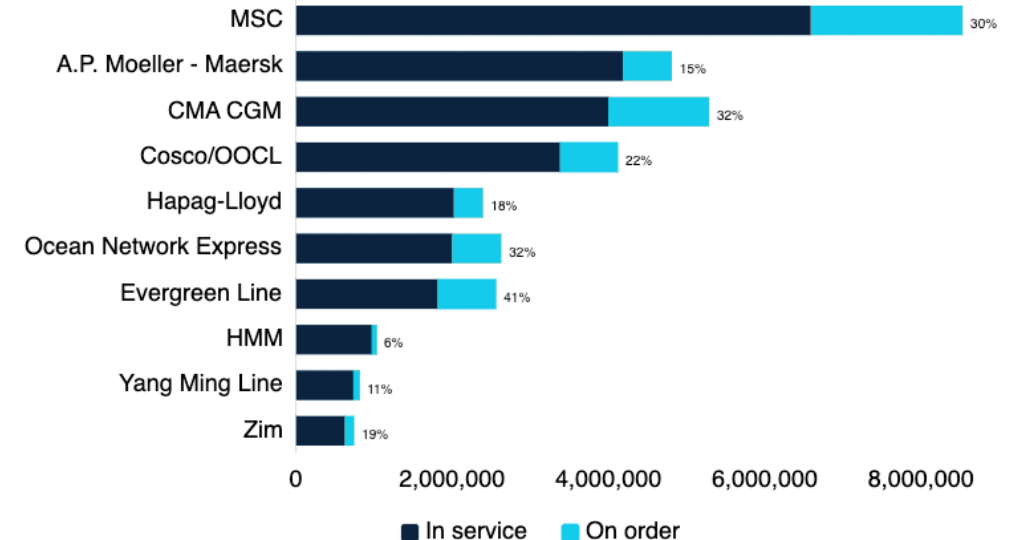
Source: Clarksons Research, Financial Times.

Note: Compensated gross tonnage is a unit of measurement used in the shipbuilding industry to reflect the relative workload of constructing different types of vessels.

## MSC Widens Market Share Among Ocean Carriers

Mediterranean Shipping Company's (MSC) relentless pursuit of capacity continues to widen the gap with Maersk, its former 2M alliance partner. **MSC's fleet grew 5.5% in H1 '25, adding some 365,173 TEUs to its fleet.**

Container ship capacity in service and on order (by carrier).



Source: Sea-web, S&P Global.

## Red Sea Tensions Escalate Again, Impacting LNG Market

Yemen's Houthi militants [vowed](#) to escalate their attacks on merchant ships in the Red Sea and plan to [attack](#) ships that belong to any company trading with Israel regardless of the company's nationality.

- The Houthi rebels' recent spike in physical attacks is being [mirrored](#) by increased jamming and spoofing of GPS signals, which effectively remove position, navigation and timing information from the ship's control room.
- Shipping costs for liquefied natural gas (LNG) cargoes [rallied](#) to their highest point in eight months as vessel availability continued to tighten.
  - Around 20% of global oil and gas demand [flows](#) through the Strait of Hormuz.
- Regional carriers are steadily [adding](#) capacity to vessel strings through the Houthi-controlled Bab-el-Mandeb Strait.





## Middle Corridor Rail Freight Becomes Increasingly Important

The Middle Corridor, running via Kazakhstan, Azerbaijan, Armenia, Georgia and Turkey, is the shortest railway path between China and Europe, and has become increasingly attractive as shippers try to avoid Russia.

Senior rail managers from China, Kazakhstan, Uzbekistan, Turkmenistan, Iran, and Turkey recently met to collaboratively [develop](#) China-Europe container traffic strategies.

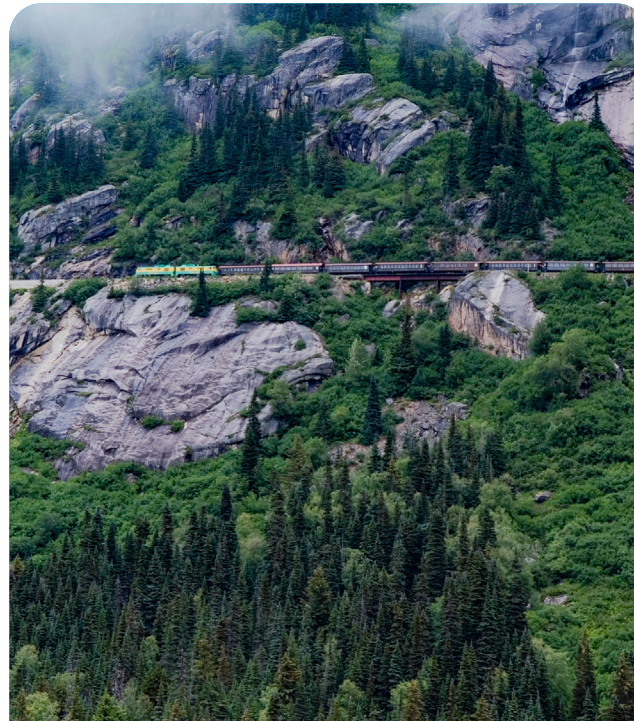
## Notable Developments



China Railway (CR) recently signed a memorandum of understanding (MoU) with Azerbaijan Railways (ADY) to [strengthen](#) cooperation and develop intermodal freight traffic along the Middle Corridor, also known as the Trans-Caspian International Transport Route (TITR).



Afghanistan's Ministry of Public Works and Kazakhstan's Ministry of Transport [will build](#) a 115km railway from Tawrgondi on Afghanistan's border with Turkmenistan to Herat in Kazakhstan. Kazakhstan's government will provide \$500m in funding for the project as part of a wider investment program to develop regional infrastructure.



Separately, China Railways (CR) is working to develop the Middle Corridor with Kazakhstan Railways (KTZ) to improve infrastructure connectivity and implement upgraded rail lines, logistics facilities and intermodal terminals.

**Kazakhstan's government set the target of [attracting](#) \$150b in investment by 2029, and China has already become Kazakhstan's top trade partner.**

Kazakhstan's government wants to end the monopoly of state-owned Kazakhstan Railways (KTZ) for freight operations and hopes to [introduce](#) independent operators on the country's national network in 2027. Under the planned reforms, KTZ will become an infrastructure manager within the Ministry of Transport and will provide all operators with "equal and non-discriminatory access to the national railway network" while its assets will be transferred to a newly established railway carrier.

KTZ [signed](#) a loan from Abu Dhabi Commercial Bank and Deutsche Bank to borrow up to SFr \$480m (\$USD \$595.5m) for key infrastructure projects along the Trans-Kazakhstan corridor.



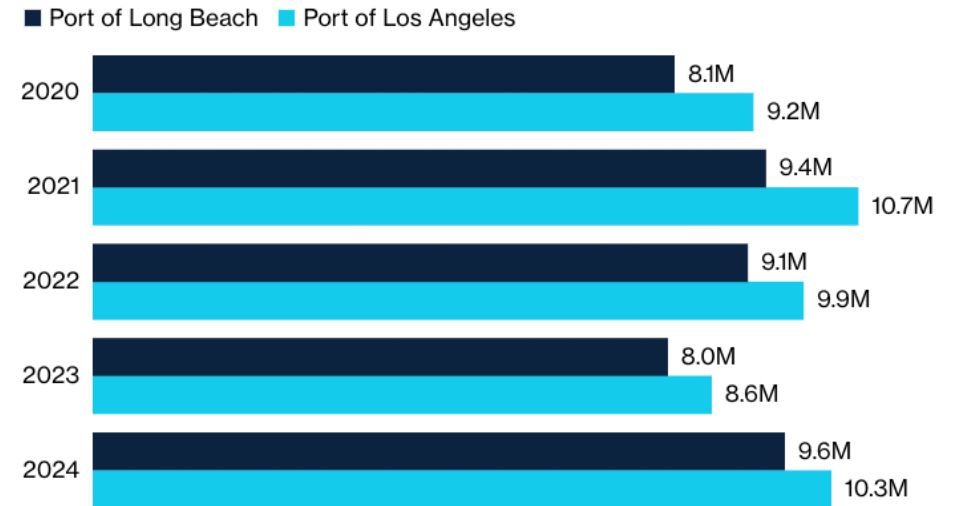
## China and Brazil Plan Pacific/Atlantic Rail Link

China and Brazil signed an agreement to **construct** a rail corridor that would connect the Atlantic and Pacific oceans. The planned "Two-Ocean Railway," will **connect** Brazil's east coast to Peru's Chancay Port, creating a brand-new land/sea logistics corridor in Latin America.



**International Transportation Service (ITS) will spend \$365m to expand annual capacity at Long Beach's Pier G terminal to 2.3m TEUs (+50%), with the extra 900k TEUs allowing Long Beach to surpass Los Angeles as the United States' largest container port by volume.**

Pier G terminal is currently cut in half by an unused inlet, which limits its size and the number of container ships that are capable of berthing there. ITS' investment should **increase** Long Beach's container capacity by about 50% and enable it to handle two 18,000-TEU ships at once.



Source: Port of LA, Port of Long Beach.  
Note: Chart shows total annual TEUs, or twenty-foot equivalent units, a standardized measurement used for counting containers of varying lengths.



**Yantian Port in South China will add three 200,000 ton-class automated container berths by 2026.** With a 1,470-meter-long wharf line, the new berths are designed to accommodate mega-container vessels up to 32,000 TEUs.



The Saudi Ports Authority (MAWANI) **began** construction on a SAR \$689m (USD \$183.7m) logistics corridor between Jeddah Islamic Port and the Al Khomra Logistics Zone. The project is expected to increase Jeddah Islamic Port's handling capacity by 10% and enhance freight traffic efficiency throughout the area.



**Saudi Arabia's Port of NEOM and the nation's Logistics Partnership Council conducted a pilot initiative to establish a new intermodal trade corridor between Saudi Arabia, Egypt and Iraq.** The trial has reportedly more than halved the transit time between these three regional trading hubs.

**DP World will invest \$800m in Syria's Tartus port via a 30-year Build-Operate-Transfer (BOT) concession agreement.** The deal will **modernize** the port, **making** it a strategic trade hub between Southern Europe, the Middle East, and North Africa. Tartus will **introduce** upgraded infrastructure, advanced cargo-handling equipment, and digital systems to improve operations across both container and general cargo terminals.



The Port of Hamburg (Germany) **announced** a €1.1b (USD \$1.29b) investment to enhance the Elbe approach to the Waltershofer Hafen and develop additional terminal yards. **Navigation towards the Container Terminals Buchardkai (CTB) and Container Terminal Hamburg (CTH) will be easier and all berths in the Waltershofer Hafen should benefit as it is expected to increase throughput efficiency.**



**HMM and CMA CGM will invest \$176m to increase capacity at the Spanish Algeciras terminal by 60%, eventually reaching 2.8m TEUs, up from the current 1.6m.** The Port of Algeciras is one of the two largest transshipment hubs in the Mediterranean, and the upgrades will **create** more berths for 24,000 TEU ships, with new container cranes, storage yards, and rail networks on the Isla Verde exterior.



London Heathrow Airport plans to **invest** £10b (USD \$13.6b) over the next five years to upgrade its terminals and services. These plans include building a new north-west runway, crossing London's M25 motorway.



The European Investment Bank (EIB) **continues** to **boost** Papua New Guinea's (PNG) infrastructure at Rabaul Port as part of a €40m (USD \$46m) cooperation package with the EU.



Oregon **approved** a \$100m investment for the Pacific Coast Intermodal Port (PCIP) in the state's southwest to further develop a modern container terminal at the Port of Coos Bay.



**The Port of Oakland will deepen its inner and outer harbor's turning basins to accommodate larger vessels.** The design phase will begin in late 2025, with construction **scheduled** to start in 2027.



The U.S. Department of Transportation (DOT) **unveiled** >\$35m in maritime financing under the Better Utilizing Investments to Leverage Development (BUILD) program.

- In Pennsylvania, the Redevelopment Authority of the County of Bucks has been awarded the highest funding amount possible under the BUILD grant (\$25m) for the revitalization of the Bristol Port Terminal.



## New Compliance Rules in Saudi Arabia

Saudi Arabia has **rolled out two key customs regulations in 2025 to improve cargo handling and import compliance. These new compliance measures may affect shipment planning and container loading practices.**

### Mandatory Use of Pallets – Circular No. 6/2025

- **Effective:** Phased implementation from May 2025 for over one year.
- **Requirements:** All containerized goods must be loaded and stowed using pallets at Saudi ports.
- **Exemptions:** Bulk, oversized, or heavy machinery shipments, with formal approval from the Saudi Ports Authority.

### Mandatory Product & Shipment Conformity Certificates (PCoC & SCoC)

- **Effective:** January 1, 2025
- **Requirements:** All imports must have both PCoC and SCoC issued through the SABER platform.
- **Impact:** Self-declaration is no longer accepted. Non-compliance can lead to shipment delays and financial penalties.



The U.K. Department for Transport (DfT) **proposed** amendments to the existing national policy statement for ports (NPSP), with the updated framework **designed** to “streamline the planning process for ports in England,” better support ports to “deliver important national infrastructure more quickly,” and to “expedite planning applications by more clearly outlining the existing needs for port facilities and how to design applications to meet the latest requirements to avoid process delays.”



The European Union adopted its 18<sup>th</sup> sanctions package against Russia, which bans refined product imports from third countries and blacklists 105 more tankers, bringing the total number of sanctioned vessels to 444.

**In addition to vessel-specific measures, the EU is lowering the price cap for Russian crude oil from \$60 to \$47.6 per barrel and introducing an automatic mechanism to keep the cap aligned with global oil prices.**





## Trump Administration Targets Trucking Cabotage Laws and Drivers' English Proficiency

The Trump Administration continues to **target trucking fleets' operations in two major ways: greater enforcement of cabotage laws and stronger English proficiency requirements.**

That latter has a major effect on Spanish-speaking drivers, such as those crossing into the U.S. from Mexico with B-1 visas or domestic drivers who are U.S. citizens. These changes may significantly disrupt cross-border trucking operations, especially along the U.S.–Mexico corridor.

- Safety inspectors and law enforcement agencies are now being **instructed** to initiate roadside inspections for routine traffic stops in English and then issue an English-language proficiency (ELP) assessment if they believe a driver has not fully understood their instructions. If a driver fails that assessment, their employer is required to take them out of service. Drivers are no longer allowed to use language aids to communicate during inspections or traffic stops.
- **According** to U.S. Transportation Secretary Sean Duffy: "A driver who can't understand English will not drive a commercial vehicle in this country. Period."

## U.S. Places New Restrictions on Mexico's Air Operations

Mexican airlines will be **required** to **file** schedules with the U.S. Department of Transportation (DOT) for all their U.S. operations by July 29<sup>th</sup>, 2025, so it can **review** whether any services violate the law or affect the public interest.

- Filings must include the type of aircraft used, flight frequency, origin-and-destination airports, and arrival/departure times.

Carriers will also require prior DOT approval before operating any large passenger or cargo aircraft charter flights to or from the U.S.

- As part of this, The Trump administration is threatening to **revoke** antitrust immunity for Delta Air Lines Inc. and Grupo AeroMexico's pricing agreement.





The U.S. Department of Justice (DOJ) **named** “trade and customs fraud, including tariff evasion” a strategic focus, making the detection of, and punishment for, trade and customs fraud a top enforcement priority. This signals that there will be increased scrutiny of import/export documentation and valuation accuracy.



Foreign vessels now **require** approval from Russia’s FSB security service to access the country’s ports, according to a **new decree** which immediately took effect.



The U.S. Department of Transportation (DOT) is **seeking** public ideas for its next major transportation bill. The **Request for Information** (ROI) invites “ideas, comments and information” to help shape the next multi-year surface transportation legislation, with the current five-year authorization expiring on September 30<sup>th</sup>, 2026.



**The U.S. is hoping to increase enforcement of transshipment restrictions as China increasingly relies on third countries for the manufacturing of its final products and components.** If transshipments are targeted via higher levies or stronger supply chain requirements, it would threaten 70% of China’s exports to the U.S. and more than 2.1% of China’s gross domestic product (GDP).



The Panama Ship Registry will **no longer accept** oil tankers or bulk carriers that are 15+ years old in an effort to **limit** the use of ‘shadow fleet’ vessels that circumvent sanctions.

- In May ‘25, Panama **tightened** its ship-to-ship (STS) oil transfer requirements for tankers sailing under the Panamanian flag.



## New LTL Freight Classifications are More Density-Based

The National Motor Freight Traffic Association (NMFTA) recently changed many commodity classifications to make density the primary transportation characteristic. These changes took effect on July 19<sup>th</sup>, 2025, for all carriers that participate in NMFTA.

- Notably, FedEx Freight, the largest road freight carrier in the U.S., delayed enforcement of the new classifications for 150 days to give customers more time to adjust.



**H.R. 4336**, the bipartisan Customs & Border Protection (CBP) Securing Ports and America’s Commerce and Economy (SPACE) Act, aims to clarify CBP’s leasing authority for operational space at seaports and other facilities, close enforcement gaps due to inadequate infrastructure, and enhance coordination with port authorities to bolster U.S. supply chain security.

- Ports have **asked** Congress to help **shift** the costs of operating local customs offices and support processing fees to cover expenses from facility inspections.
- **Traditionally, the costs associated with government port inspections have been the federal government’s responsibility, but CBP wants ports to cover the cost of screening equipment, or operations may be halted.**



**H.R. 1**, nicknamed the “One Big Beautiful Bill Act”, includes tax provisions that are expected to help trucking companies grow their business via a permanent extension and enhancement of the 20% deduction for Qualified Business Income (QBI).

The QBI deduction **allows** trucking companies and other businesses that are set up as sole proprietorships, partnerships, and S corporations to avoid being placed at a tax disadvantage relative to large corporations.

### The legislation also:

- Expands education savings plans to cover expenses for truck driver training, **making** it easier for new truck drivers to obtain a commercial drivers license (CDL).
- Provides \$492m for next-generation shipbuilding techniques, to go toward novel technologies that would help U.S.-based companies strengthen their foothold in the sector.



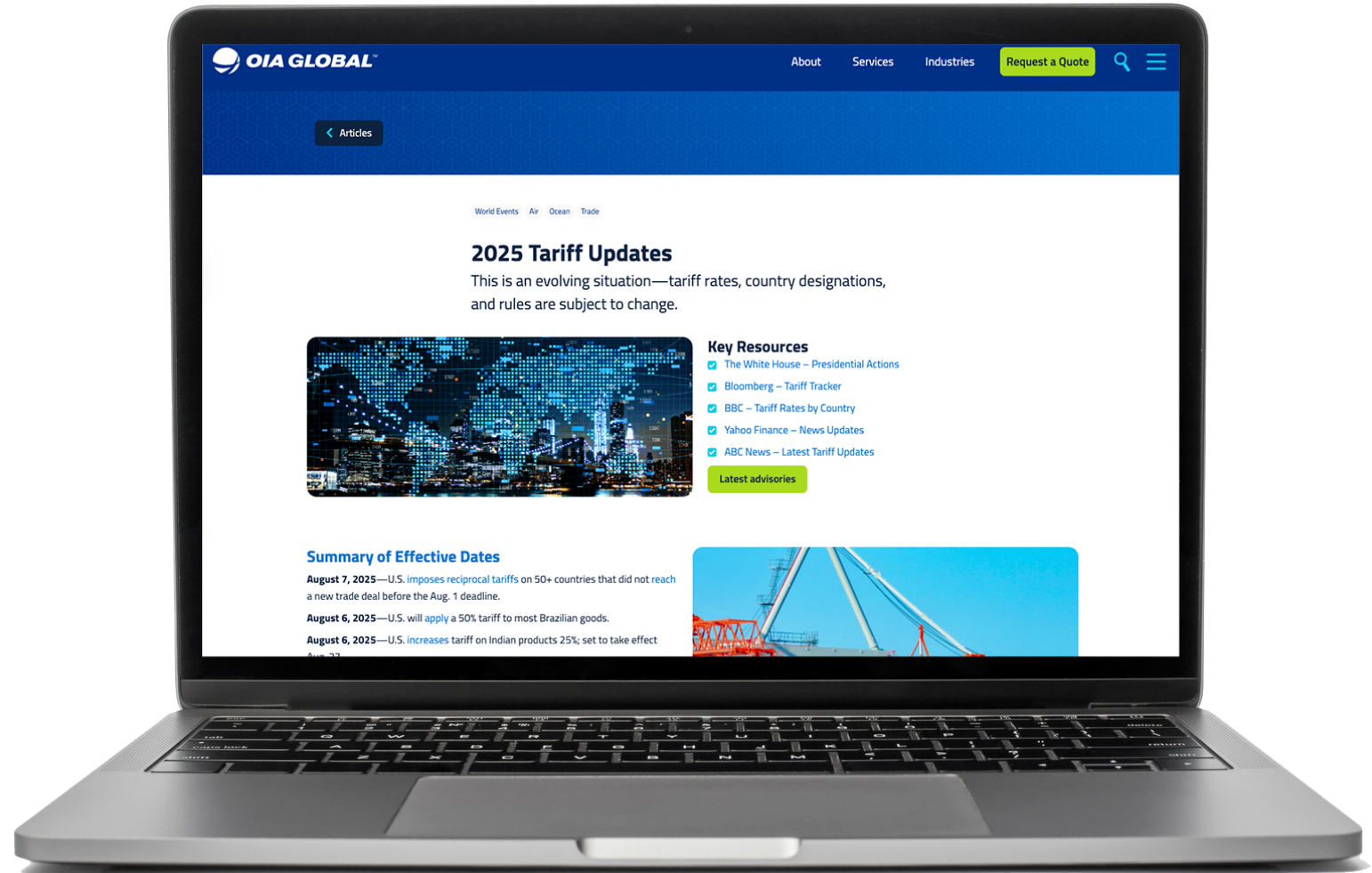
## Tariffs & Surcharges

**As of August 7<sup>th</sup>, 2025, the U.S. has enacted sweeping reciprocal tariffs on imports from 60+ countries, with duties ranging from 10% to over 100%, depending on the origin country and sector.**

Other factors like sector-specific penalties and anti-transshipment provisions will further complicate the trade landscape. The impact on landed costs, sourcing strategies, and compliance protocols will be significant.

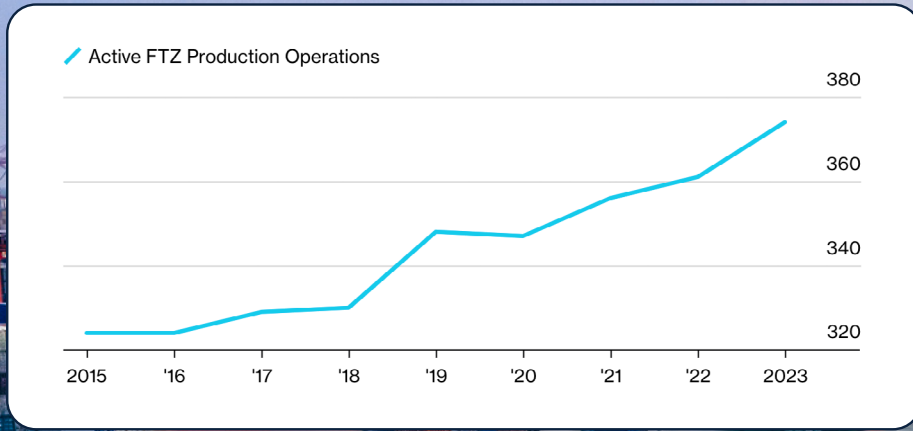
Trade negotiations are evolving quickly! All parties in the supply chain industry should recognize that these widely impactful laws will change regularly and significantly. **OIA Global publishes advisories, including updates about the latest tariff developments and other critical news.**

### Latest Advisories



# Foreign Trade Zones (FTZs) vs. Bonded Warehousing: What's Right for You?

Both offer tariff mitigation strategies for shippers importing goods into the U.S., but there are critical differences between the two...



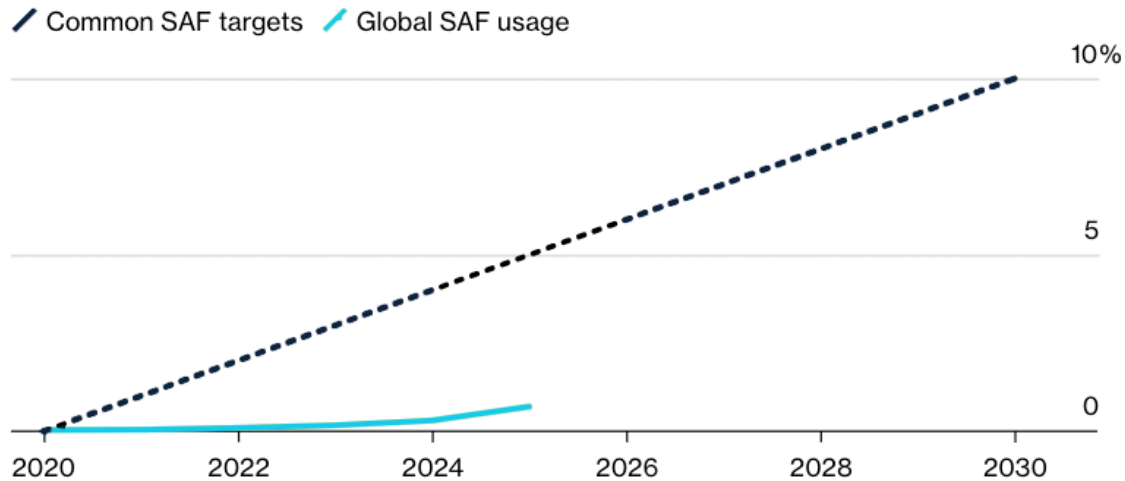
[More Information](#)



## Airlines Aren't on Track to Meet Their Clean-Fuel Targets

Globally, sustainable air fuel (SAF) as a percentage of all aviation fuel is expected to increase from 0.3% to 0.7% this year. **Although carriers are using more SAF than ever before, these climate benefits are being outweighed by increases in air travel.**

- For example, IAG SA consumed the most sustainable aviation fuel last year, acquiring 55m gallons of cleaner jet fuel, but this accounted for only 1.9% of IAG's overall fuel consumption, and its emissions from fuel combustion still rose by 5%.



Source: International Air Transport Association, airline pledges.  
Note: IATA projects 0.7% SAF usage in 2025.

## Global Shipping Emissions Continue to Rise, Led by EU

**Q1 '25 greenhouse gas emissions (GHG) rose 19.38% year-over-year (YoY) to reach nearly 60m tons, largely fueled by container traffic diversions around southern Africa to avoid attacks in the Red Sea.**

- In particular, the Red Sea crisis has created a **significant spike** in container shipping emissions within the EU—up 45% in 2024—reversing years of environmental progress in the sector.
- The rise in shipping emissions will eventually appear in the pockets of European cargo owners as regulators phase in the EU's **Emissions Trading System (ETS)** and the **FuelEU Maritime regulation**.



Starting this year, the European Union (EU) and the United Kingdom (UK) will **require** jet fuel to include at least 2% SAF. Other requirements have also been enacted or planned in Brazil, Indonesia, Singapore, and Canada.

The U.S. Environmental Protection Agency (EPA) wants to rescind the 2009 endangerment finding, which allowed the EPA to address climate change under the Clean Air Act. This would eliminate the EPA's authority to regulate greenhouse gas (GHG) standards for vehicles, including heavy-duty trucks, completely altering the market for fleet vehicles and components.



Samsung Heavy Industries **installed** an amine absorption-based capture system aboard the *HMM Mongla*, a feeder vessel, and after a year of onboard testing, the results demonstrated feasibility of carbon capture and storage systems (OCCS), showing their effectiveness and commercial potential.



- In January '25 and May '25, Samsung/HMM were able to offload liquified CO<sub>2</sub> with over 99.9% purity, which was used as a raw material to produce eco-friendly methanol that could be used as marine fuel.
- The report showcases a meaningful instance of carbon utilization beyond underground storage of liquified CO<sub>2</sub>.



After nearly two decades of work, the **Hong Kong Convention**—the Hong Kong International Convention for the Safe and Environmentally Sound Recycling of Ships—officially took effect on June 26<sup>th</sup>, 2025, a significant milestone for the maritime industry to establish mandatory regulations that govern how ships are recycled at the end of their operational lives.



Germany's government **pledged** €400m in support of climate-neutral shipping and port infrastructure. The funds will be allocated from the country's Climate and Transformation Fund (KTF) to accelerate the maritime industry's energy transition.

Swire Shipping **announced** a new carbon insetting program, *Voyage to Zero*, which gives customers access to greenhouse gas (GHG) emissions savings from Swire's use of biofuels on its cargo vessels.

## Mergers & Acquisitions

**Union Pacific Corp. announced a bid to purchase Norfolk Southern Corp. for \$85b in stock and cash, according to a joint statement from both companies.** If 2/6 of the United States' largest railways **combine**, it would create the largest railroad in North America and a truly transcontinental railroad that **connects** more than 50,000 route miles across 43 states, linking approximately 100 ports.

- Any **combination** between the two freight railway operators would **face** intense regulatory scrutiny from the U.S. Surface Transportation Board, the federal freight railroad regulator.



**Portugal relaunched the privatization of its flagship airline Transportes Aéreos Portugueses (TAP), but the latest plan is less radical than earlier versions.** TAP now wants to sell 49.9% of its business but will reserve 5% of this for employees, whereas previously TAP contemplated selling up to 100% of the company.

- TAP offers particularly strong links to Brazil as well as connections to Africa through routes in Angola and Mozambique.



CK Hutchison's **sale** of its 40+ global port facilities to U.S.-based investor BlackRock and Mediterranean Shipping Company (MSC) could be **blocked** by China, unless Chinese shipping company COSCO is **included** in the deal.

- CK Hutchinson claims to be **negotiating** with a "major strategic investor from China" with more details forthcoming.
- Chinese authorities say they will continually **monitor** the negotiations and progress of the sale.



Air France-KLM, which already owns nearly 20% of Scandinavian airline SAS AB, will **raise** that share to 60.5% by acquiring the stakes held by Castlake LP and Lind Invest. The deal allows SAS to continue growing its network via integration with Air France-KLM's fleet.

- The acquisition is part of the **consolidation trend** in European aviation, with Air France-KLM seeking to better compete with rivals Deutsche Lufthansa AG and IAG SA.



## Mergers & Acquisitions



**ANA Holdings completed its acquisition of Nippon Cargo Airlines (NCA), officially making ANA the largest combination cargo/passenger airline in Japan.** ANA is now the 14<sup>th</sup> largest airline group in the world based on cargo volume and should be more resilient against market swings.



Korean airline Air Incheon completed its takeover of Asiana Airlines' cargo business and formally **rebranded** it as AirZeta.



Saudia Cargo is **creating** of a joint venture with Hong Kong-based GSSA TAM Group to establish a Saudia Cargo Global entity that will enhance its commercial reach, service capabilities, and customer engagement in Greater China and Asia-Pacific markets.

- The goal is to significantly increase cargo flight frequencies between Riyadh and Shanghai, China, Manila (Philippines), Kuala Lumpur (Malaysia), Addis Ababa (Ethiopia), Jakarta (Indonesia), and Cairo (Egypt), as well as boost connections to various European destinations.

## Transport Technology



### ShipNow by OIA Global

**New digital platform gives customers all quoting and booked freight activity, on demand!**

ShipNow by OIA Global gives customers access to less-than-truckload (LTL) shipping rates from OIA's comprehensive transportation network in as little as 30 seconds. This easy-to-use web tool gives customers the freedom to quote costs when you need them; whether its to quote their own customer, confirm costs before approval to ship, or view carrier options and book ready-to-ship freight. **ShipNow gives customers the tools they need to get the right rate and carrier, when they need it.**

**More Information**

### Autonomous Trucking Makes Gradual Advancements

The transportation industry is **making** consistent, step-by-step advancements toward fully autonomous trucking. **If autonomous technology eliminates onboard human labor—particularly in long-haul scenarios—the unit economics could shift, and the full truckload (FTL) trucking market would more resemble rail or ocean shipping, which are far more consolidated and benefit from scale.**

- Whether you run 1,000 trucks or 10, filling the final one offers only a small advantage over a competitor that does not. There's little difference in unit economics between a large and small fleet when it comes to incremental growth, which why there aren't as many dominant players in FTL as in other sectors.





Since 1988, OIA Global has grown to become a world leader in supply chain management by delivering creative end-to-end logistics solutions with an industry-leading customer experience. Unlike many other companies, OIA goes beyond transportation management to offer customized contract logistics services, such as warehousing distribution and inventory management, as well as 4PL supply chain orchestration, innovative packaging design, raw materials management, and several advanced technology solutions.



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