



Market Report 12/2025



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](#)

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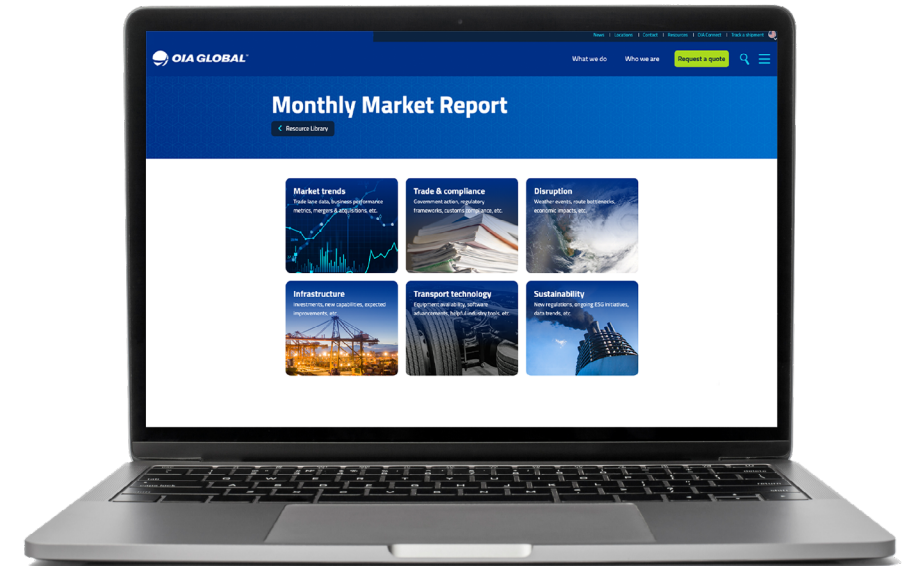
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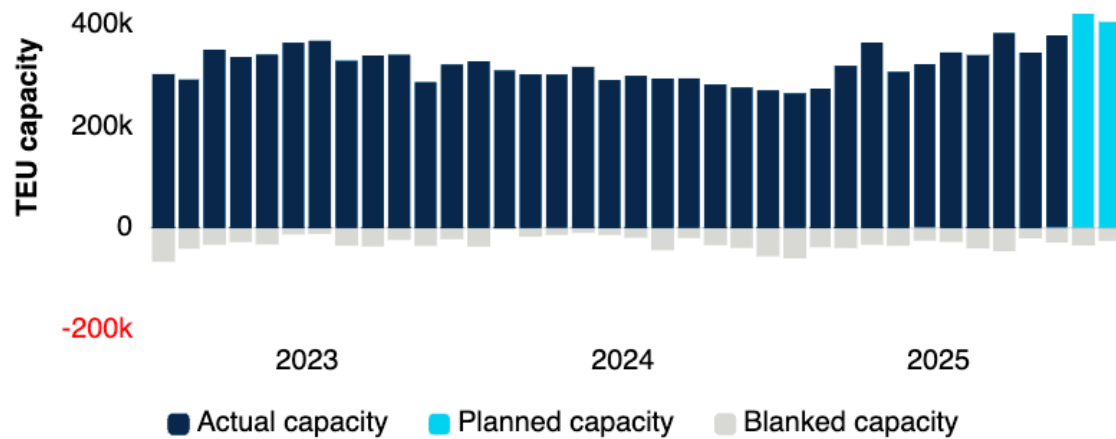
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Rise in Capacity on Westbound Transatlantic

Ocean capacity on the TransAtlantic westbound trade lane recently reached a 28-month high.

The graphic below shows container ship capacity deployed from Northern Europe to the U.S. East and Gulf Coasts, with historical blanked capacity, planned capacity, and blank sailings already announced.



Source: eSea via S&P Global.



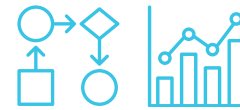
In particular, Mediterranean Shipping Company (MSC) is working to **build market share** via wide-scale capacity injections on the trade lane, using larger vessels and new service offerings.





Air cargo volumes have remained strong despite the United States' decision to end the *de minimis* exemption for low-value parcels. Volumes from China to the U.S. quickly returned to normal levels, largely driven by E-commerce, although many U.S. importers are seeking suppliers from other countries besides China.

- Overall, tonnages from Southeast Asia to the U.S. **were** +26% year-over-year (YoY) during the first ten months of 2025.
- Chinese data **showed** about \$5.4b worth of these small packages were sent to the U.S. since the Trump administration closed the loophole in May '25.
- Carsten Spohr, Lufthansa's Chief Executive, recently **stated** that for TransAtlantic trade, the "*weakest point is now behind us*"; and that the "*dip was not as bad as some people have been expecting*."



Containership scrapping recently **declined** to a three-year low, as liner operators' relentless chase for market share continues, keeping charter rates and resale prices high.



U.S./China trade tensions have created greater opportunities throughout Africa, particularly for nations that can serve as alternative transit hubs to bypass tariffs. For example, DP World plans to spend more than \$3b this decade expanding port and logistics infrastructure in Africa, where it sees long-term demand and growth in critical mineral exports, with the biggest opportunities for growth in Nigeria, Senegal, and the Democratic Republic of the Congo (DRC).

Major Carriers Plan Tentative Return to Red Sea Shipping

Yemen's Houthi rebels signaled a halt to their attacks on commercial ships in the Red Sea following the tenuous ceasefire between Israel and its neighbors. Officials at major shipping lines are actively discussing a return to the shipping lane, with some regional carriers already acting, but the future is still very uncertain.

- The Houthis **did observe** a ceasefire at the start of 2025, but when hostilities resumed in Gaza, the Houthis also resumed their activities.
- CMA CGM and Maersk are both **preparing** for a return next month. "*Given the significant progress on both fronts, Maersk will take steps to resume navigation and, over time normalize the transits on this route,*" the company stated.

"We are closely monitoring developments and declare that if the enemy resumes its aggression against Gaza, we will return to our military operations deep inside the Zionist entity [Israel], and we will reinstate the ban on Israeli navigation in the Red and Arabian Seas."

- Yusuf Hassan al-Madani, Houthi Armed Forces' Chief of Staff

TransPacific Ocean Trade Update

There has not been a major resurgence on the TransPacific ocean trade following a de-escalation of trade tensions between China and the U.S.

- Amidst weaker demand and lingering uncertainty, ocean carriers continue **to seek** higher freight prices through general rate increases (GRIs).
- Transpacific routes **still show** signs of overcapacity while Asia-Europe lanes remain tight as carriers manage their capacity strategically.



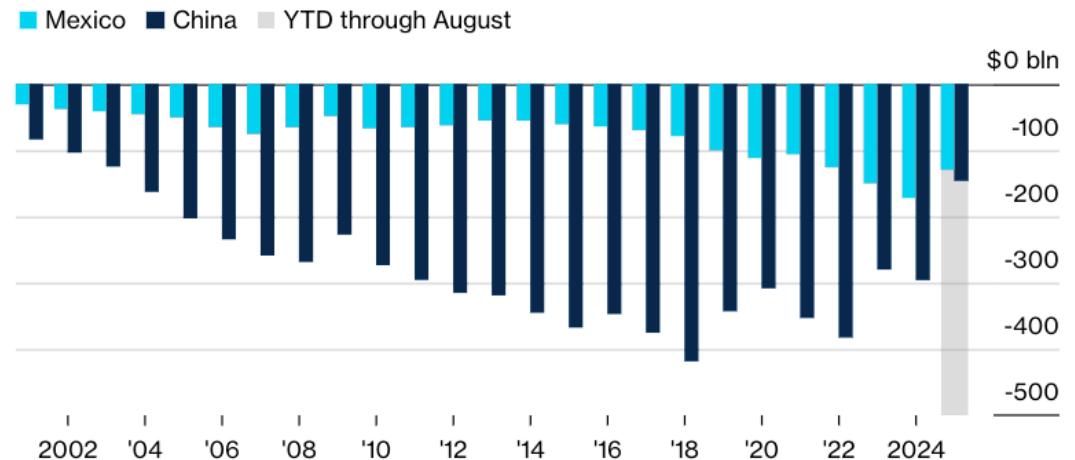
"About 2/3 of all exports from China to the U.S. face tariffs of up to about 25% put in place during the first Trump administration. With these coming on top of the now 20% tariff baseline on all Chinese exports, tariffs on China are still significantly higher than on other countries."

- Judah Levine, Freightos



Mexico's Trade Gap with the U.S. Widens as China's Shrinks

The value of shipments from India, Indonesia, Malaysia, Taiwan, Thailand, and Vietnam all posted year-to-date (YTD) gains of >20%.



Source: US Census Bureau via Bloomberg.

Mergers & Acquisitions

Union Pacific and Norfolk Southern shareholders voted in favor of the proposed merger of the two railroads, a key milestone in the combination process.

- 18 U.S. Senators recently **sent a letter** to the Surface Transportation Board (STB) urging the federal agency to conduct “a rigorous and comprehensive evaluation” of the potential combination.

Emirates and Air Canada are **extending** their strategic partnership into 2032 and increasing cooperation on freight operations to enhance bi-directional cargo flows between the Americas, the Middle East, and India. The airlines are also exploring a potential joint venture that would focus on cargo operations “to support the efficient movement of commodities globally.”



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](#)



- Peru's Port of Matarani **will get** a \$700m expansion, supported by investment group BlackRock's global infrastructure partners. The Port of Matarani will increase its berthing capacity by 25% and its cargo handling capacity by 50% through new electric cranes, strengthening its role as a key multipurpose terminal for Peruvian foreign trade.
- Dutch port operator APM Terminals **will invest** \$550m to expand Peru's Callao port, with the two-year project aiming **to increase** the terminal's capacity to 24,000 containers.



France and the European Union **will provide** €203m to Gabon for rail transportation upgrades, increasing the capacity of Transgabonais, its sole railway line, to 16 train paths per day, or eight trains in each direction.



Tanzania will **start construction** of Bagamoyo Port in December '25, ending a decade of delays. Bagamoyo is located about 75 km (47 miles) north of Tanzania's commercial capital, Dar es Salaam, and is part of a larger-scale economic zone with industrial parks and rail and road links.



CMA CGM and AD Ports **will add** almost 1 million TEUs of capacity to their terminal in Abu Dhabi's Khalifa Port, with the facility **already full** just 11 months after opening.



Bangladesh **will develop** the Laldia Container Terminal in Chattogram. The project, valued at more than \$550m, is one of Bangladesh's largest public/private investments, and will significantly **increase** port handling capacity (+800K TEUs) and **improve** the flow of national trade.



EU's Shipping Emissions Spike Despite Regions' Ongoing Efforts

European shipping emissions reached unprecedented levels in 2024 (+13%), the highest point since mandatory reporting began in 2018, according to a [new report](#) from the European Federation for Transport & Environment. Despite Europe's growing renewable energy adoption, fossil fuel carriers continued to account for approximately 20% of all EU shipping emissions, unchanged from 2018 levels.

- The European Commission has adopted the Sustainable Transport Investment Plan (STIP), [establishing](#) a common approach to boost investments in renewable and low-carbon fuels, focusing on waterborne and aviation transport.

11-15 years

A [recent report](#) which [analyzed](#) >73,000 containership voyages around the world and found that the cleanest voyages were seen in ships 11-15 years old, not the brand-new vessels. The findings suggest that how ships operate, including route choice, vessel loading, and speed, plays a larger role in emissions than age alone.



Naval architecture and marine engineering company AURELIA Design and climate-tech company CALCAREA have [joined forces](#) to bring ocean-based carbon capture to commercial shipping. The collaboration seeks to combine AURELIA's expertise in green ship design and e-systems integration with CALCAREA's carbon removal process.



Los Angeles and Long Beach [committed](#) to a binding emissions agreement with regulators, establishing concrete deadlines for [a transition](#) to zero-emissions infrastructure. The plan has three phases, [beginning](#) with a draft plan in May 2027 and concluding with approved plans for all equipment categories by the end of 2029.



South Korea (Busan & Ulsan) is [partnering](#) with ports in the U.S. Northwest (Seattle & Tacoma) [to enhance](#) green shipping corridors, decarbonize maritime shipping, and accelerate the adoption of clean marine fuels.



The U.S. **exempted** 200+ agricultural products from its reciprocal tariffs, **putting** them into 11 categories and 237 classifications.



In the latest twist of a long saga, the United States Court of Appeals for the 11th Circuit temporarily halted a Department of Transportation (DOT) order to force Delta Air Lines and AeroMexico to unwind their joint venture (JV) by January 1st, 2026.



The Trump Administration **announced** framework agreements on reciprocal trade and investment with Argentina, Ecuador, El Salvador, and Guatemala.

- The baseline tariff rate of 10% will remain in place on goods from Argentina, El Salvador, and Guatemala, and a 15% tariff rate will remain in place on Ecuador.
- The frameworks will allow tariffs to be lowered or dropped on certain goods, such as bananas, coffee, and cocoa.



The United Kingdom and Indonesia signed a £4b (USD \$5.2b) deal to strengthen maritime resilience and security in both nations, which should bolster Indonesia's shipbuilding capabilities.



China **issued** new restrictions on exports of used vehicles, closing a loophole that had allowed traders to ship new cars into overseas markets while claiming that they were **second-hand**. Now, cars that have been registered for <180 days need to prove after-sales services at their destination and have approval from the vehicle manufacturer.





U.S. Customs and Border Protection (CBP) **will use** artificial intelligence (AI) **to detect** illicit transshipment: the practice of manipulating supply chains to disguise a product's true country of origin.



The autonomous vehicle industry is **growing faster** in China than in other parts of the world because China's logistics ecosystem, characterized by high freight density and flexible policy support, has enabled an "assist first, automate later" strategy.

- Around the world, autonomous trucking faces two persistent hurdles: the **long commercialization timeline** of Level 4 fully driverless systems and the slow adaptation of regulatory frameworks to real-world operations.
- **Autonomous hauls have arrived—but there's a lot of work left to do before the technology reaches everyday carriers.** An autonomous truck market will need more than simulations, affordable sensors, or dedicated hubs; it will also **need** a dedicated equipment platform and carrier buy-in.

The Digital Container Shipping Association (DCSA) has introduced Identity Exchange, a digital platform aimed at streamlining business identity verification across the shipping and logistics sector. Identity Exchange provides a centralized gateway to verified company information, helping organizations improve data quality, reduce compliance risk, and accelerate partner onboarding, creating a more reliable basis for digital trade.

- HMM recently **completed** three pilots implementing DCSA standards, exploring how the Booking and Bill of Lading (BoL) standards enhance accuracy, visibility, and efficiency in digital information sharing. Each pilot tested DCSA standards in live environments, supported by DCSA through onboarding, technical facilitation, and partner alignment.

Ship movements that once relied on Automatic Identification System (AIS) broadcasts and port reports can now be observed visually, continuously, and without a vessel's cooperation via satellites—a quiet technological revolution that could greatly impact maritime operations. **Enhanced Electro-Optical (EO) satellite imagery, long associated with military intelligence and environmental monitoring, has rapidly matured into a commercially accessible, high-resolution tool for shippers.**



Brazil's largest rail freight operator, Rumo Logistics, is **equipping** its locomotive fleet with a satellite communications system supplied by Starlink to improve real-time connectivity across its five networks. The system's low-earth-orbit satellite technology provides high-speed, low-latency data transmission, ensuring continuous communication between trains and the control center, even in isolated or low-signal areas.



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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