



Market Report 6/2026



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](#)

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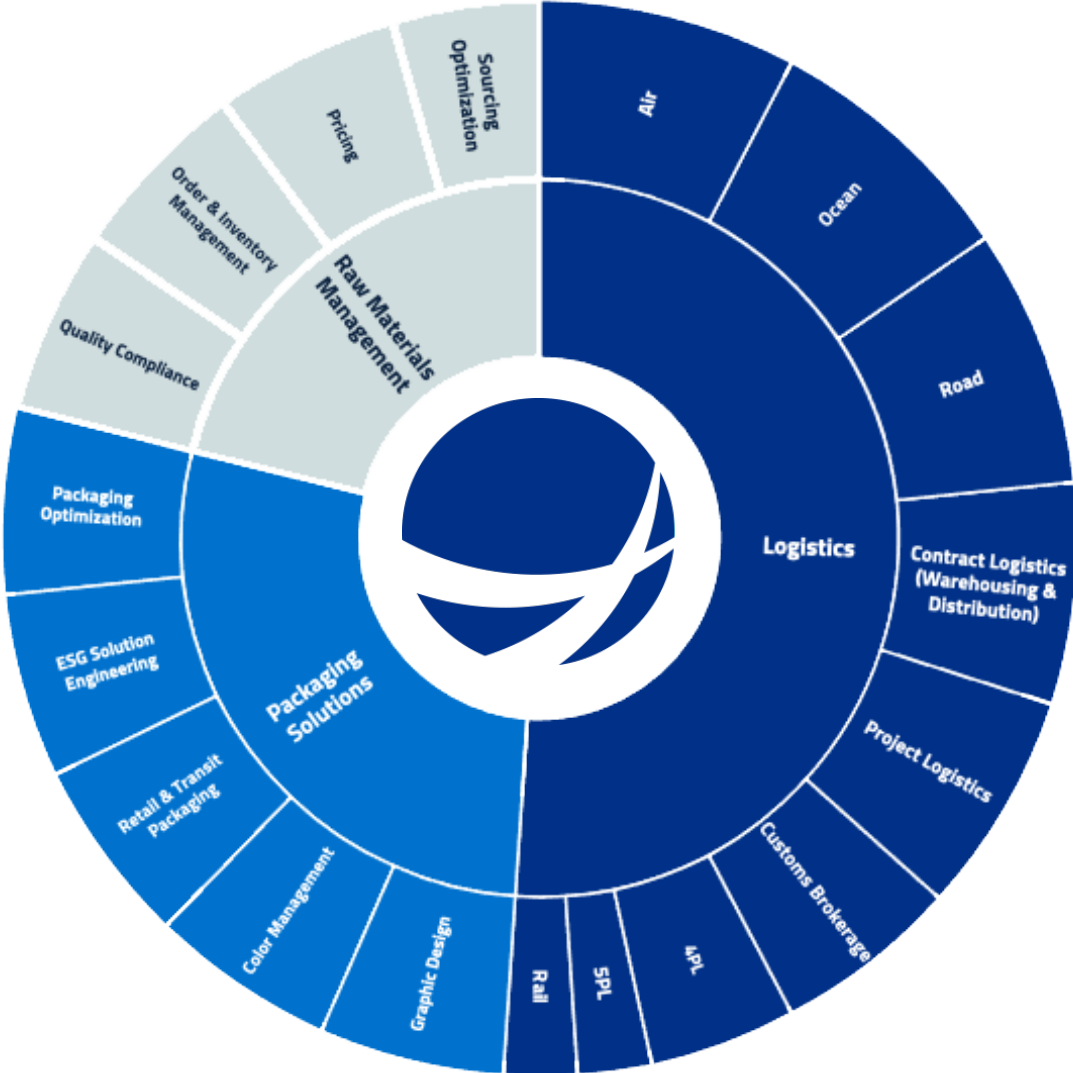


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Market Trends



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50%



The world's leading ocean carriers and their affiliates now **own** approximately 50% of worldwide terminal capacity, almost double that of 10 years ago.



April '26 import data (2.64M TEUs) shows that containerized freight imports bound for the U.S. **declined** for the 12th consecutive month (-5.2%).



The European Union unveiled a **"tech sovereignty" plan** to expand its domestic technology supply chain and **reduce** dependence on the U.S. and Asia in key areas: semiconductors, artificial intelligence, cloud computing, etc.



China's Transport Ministry is **targeting** ocean transport rate data to protect shippers from unclear pricing strategies. The enhanced scrutiny will likely raise costs for forwarders and carriers as they devote more resources to ensure compliance with rate filing procedures.



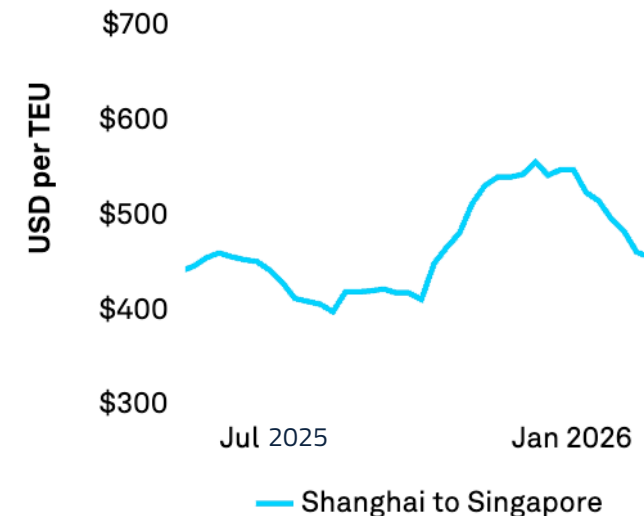
Australia has **secured** the first vessel for its long-awaited **maritime strategic fleet program**, the *ANL Kokoda*. Overall, the strategic fleet will **comprise** 12 privately owned and commercially operated Australian flagged and crewed vessels, which will remain available for the government in times of need (war, blockade, etc.).

3-5%



Global container demand **expanded** 3-5% year-over-year (YoY) during Q1 2026.

Intra-Asia trade rates continue to rise, as demonstrated by Shanghai-Singapore container spot rates. South Korea's container trade was a notable outlier as it **contracted** for a third consecutive month in April.



Source: Shanghai Shipping Exchange, via IQC.

Market Trends



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\$4M

Auction prices for priority Panama Canal transit slots have climbed to an unprecedented \$4M per vessel. These extraordinary fees, paid on top of standard canal tolls, demonstrate how the Panama Canal has become a key alternative for traditional energy and container flows as the Strait of Hormuz crisis continues to disrupt global trade.



What this means for customers: energy products and container flows are rerouting around the Middle East, affecting transit times and capacity throughout Southeast Asia and the Indian Subcontinent.

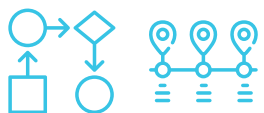


Drone delivery revenue **will grow** significantly over the next decade, from approximately \$2.2B in 2026 to \$25.3B by 2036.

- Within the delivery sector, the strongest use cases are in time-sensitive and high-value logistics rather than low-margin parcel delivery; for example, medical supplies, pharmacy deliveries, etc.
- Drones can shorten delivery times, avoid road infrastructure limitations, and improve service reliability in hard-to-reach areas.

1/3

1/3 of all containers are now moved without cargo, a sharp deterioration from the ¼ seen before the COVID-19 pandemic. In practical terms, carriers are now moving double the volume of empty containers—measured by distance—compared with before the pandemic.



- Measured in TEU-miles, 30% of all global container shipping work now involves repositioning empty boxes, up from 24% pre-pandemic.
- The number of empty containers shipped has **grown** 65% since Q1 '19, while the number of full containers has grown just 17% over the same period.

Market Trends: Jet Fuel Crisis



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India

India will **provide** 100B rupees (about USD \$1B) to support oil retailers in capping jet fuel prices and shielding local airlines from mounting cost pressures.

Since the start of the Iran war, India has introduced several different measures: rebates on plane landing and parking charges, regulating increases in jet fuel prices, and tax reductions on fuel for flights operating from Delhi and Mumbai, its biggest airports.

Europe

European airlines and oil refiners are **growing more confident** that they can avoid outright jet fuel shortages as plants maximize output; governments tap into strategic reserves, and the region sees boosted imports.



What this means for customers: the European air freight market remains volatile with limited fuel supplies, limiting shippers' options for time-sensitive shipments.



Europe's road freight market continues to benefit from uncertainty in the Middle East, with Q1 spot rates **surging** across key European corridors: France/Belgium, Netherlands, Luxembourg (+102%), France/Germany (+73%), Germany/Poland (+43%), and Poland/Germany (+37%).

[More Information](#)



Government Accepts Revised UP/NS Merger Application, but Still Requires More Information

The Surface Transportation Board (STB) **accepted** the refiled application but **noted** that it doesn't meet completeness standards. The applicants—Union Pacific (UP) and Norfolk Southern (NS)—have until July 27th to **submit** more information.

The STB is **demanding** a facility-by-facility analysis and proposed remedies for shippers whose rail options will shrink from three to two or two to one. STB wants more information on who benefits, who is excluded, and whether the program generates net public gains.



Kpler **secured** an investment of >\$1B from global investment firm Sixth Street. Founded in 2014, Kpler has grown from an LNG cargo-tracking specialist into one of the shipping industry's most influential data providers, offering insights across energy, dry bulk, maritime transport, and defense markets. The vessel-tracking platform, MarineTraffic, is among the company's brands.



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](#)

CMA CGM Expands Influence Throughout Africa

CMA CGM Group recently [signed](#) a cooperation framework with Kenya's government to develop port and logistics infrastructure and strengthen freight flows. **These investments are part of a wider strategy to develop interconnected maritime and inland logistics hubs across Africa.**



Port of Mombasa in Kenya: \$820M to [modernize](#) two terminals



The Lekki Deep Sea Port in Nigeria



Kribi Container Terminal in Cameroon: expansion works are underway to support rising sub-regional volumes.



Nador West Med terminal in Morocco



Pointe-Noire, Congo: a new deep-water terminal designed to support transshipment and regional trade flows.



Egypt: capacity expansion at Alexandria's TMT terminal. In Sokhna, CMA is also involved in the Red Sea Container Terminal with COSCO Ports and Hutchison Ports, supporting multimodal port-rail connectivity





Work has begun on the fifth development phase of Nansha Port, the main international container gateway for Guangzhou, China. The \$2B project should **increase** Nansha's capacity to 35M TEUs (+6.7M TEUs) by around 2030. Projects include four berths capable of handling ships of >21,000 TEUs, plus 15 berths for regional feeder vessels, with a combined berth length of 2.4 miles.



Russia and China agreed to lay a second 1435mm-gauge rail track between Zabaikalsk in Russia and Manzhouli in China, **increasing** freight capacity at a key 12km cross-border line and enabling trains to operate to and from China simultaneously.



Two key parts of the BUILD America 250 Act, Congress' massive federal surface transportation bill:

- \$102B **allocated** to passenger and freight rail, the largest federal investment in rail since Amtrak's creation.
- \$44.7M per year specifically for aviation safety and cybersecurity at the Federal Aviation Administration (FAA).



Belfast **unveiled** a £1.3B expansion plan to **close** the gap with its lead rival, Dublin. Although Dublin is busier, it's expected to reach maximum capacity by 2040, allowing Belfast to become the principal port on Ireland's eastern seaboard. Trade volumes through Belfast Harbour could **increase** from around 24M tons today to >30M tons by 2050.



U.S. Targets Trucking Fraud via New Registration System & Digital Portal

The Federal Motor Carrier Safety Administrator (FMCSA) is replacing its outdated motor carrier registration system to crackdown on fraudulent companies and “chameleon carriers” that have **circumvented** federal oversight. The new “Motus” tool **uses** biometrics and data analytics to ensure that applicants and the businesses they represent are legitimate, legal entities.



The National Motor Freight Traffic Association (NMFTA) launched a new **anonymous portal** where people can submit cybersecurity and fraud threats, **allowing** companies to **share** information about incidents and suspicious activity and learn from each other.

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

The U.S. Maritime Administration (MARAD) has **launched** an initiative 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, with a recent request for information inquiring about the regulatory, shipyard, insurance, and port frameworks needed to make it happen.



The International Maritime Organization (IMO) has **adopted** the first global regulatory framework specifically **designed** for Maritime Autonomous Surface Ships, known as the MASS Code.

Note: The adoption is not a regulatory green light for fleets of unmanned vessels crossing oceans under the control of artificial intelligence.



Malaysia is in a trial phase of automatic electronic ship reporting in the Malacca Strait, one of the world’s busiest waterways. The Mandatory Ship Reporting System in the Straits of Malacca & Singapore (STRAITREP) **serves** as an alternative to manual submissions by VHF radio channels, which have been used since 1998.

Emissions Trading Systems



The United Kingdom's Emissions Trading Scheme (UK ETS) will soon incorporate domestic maritime activities, effective July 1st, 2026. Voyages between UK ports (domestic voyages)

- 100% of emissions generated while vessels are in UK ports, including at berth and anchorage
- Updated emission surcharge levels, including the impact of UK ETS, will be published quarterly (starting Q3 '26) and adjusted in line with market developments.



What this means for customers: there are now carbon costs associated with UK domestic voyages and time spent at UK ports. OIA can help identify the optimal routes and mode shifts to support.



The EU is considering **extending** its emissions trading system (ETS)—a complex carbon pricing scheme—to include flights departing from the bloc, which could cost major airlines (Lufthansa, British Airways, etc.) an additional €1.5b.



Hapag-Lloyd and Kuehne+Nagel recently **completed** their first collaborative ocean freight project using waste-based Sustainable Marine Fuels (SMF). Approximately 3,000 tons of CO₂e emission reductions were **agreed** as part of a 2026 pilot program.

Hapag-Lloyd and Seaspan have completed the first vessel **conversion** under their joint methanol retrofit program. Each retrofit could reduce CO₂e emissions by 30,000-50,000 metric tons per vessel annually.



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.



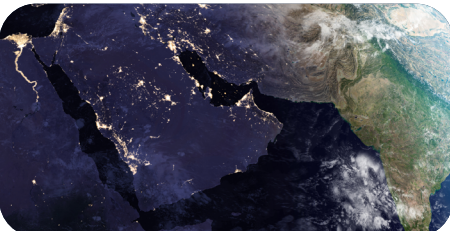
Atlantic

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.



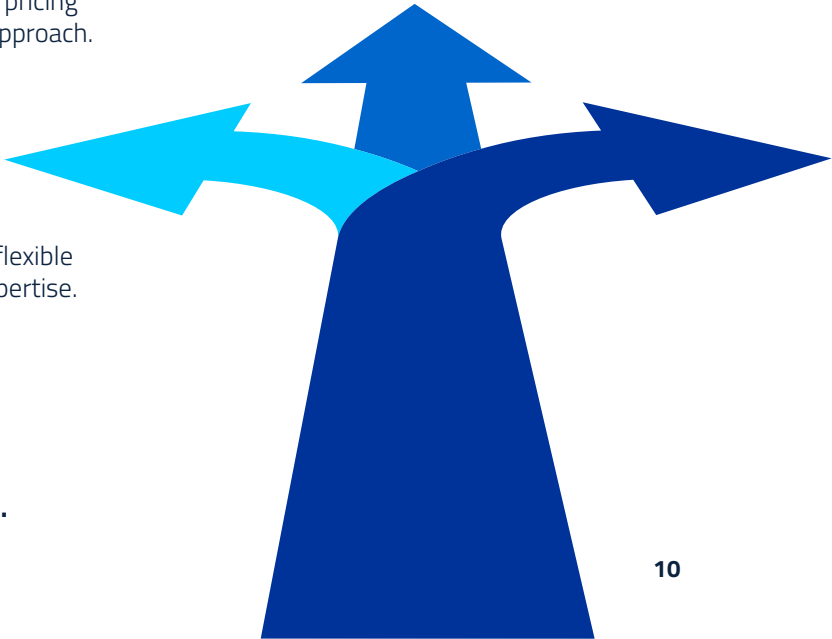
Eurasia

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**.



U.S. Customs Strengthening Enforcement

A recent [executive order](#) intends to strengthen U.S. Customs and Border Protection (CBP) in several strategic ways, with a focus on the importer of record (IOR):

- Identify insufficient customs bond requirements to [prevent](#) misclassification or undervaluation
- The U.S. Department of Justice (DOJ) has established a [Trade Fraud Task Force](#) to address transshipment maneuvers [used](#) to mask the true origin of goods.
- Target importers' use of shell companies

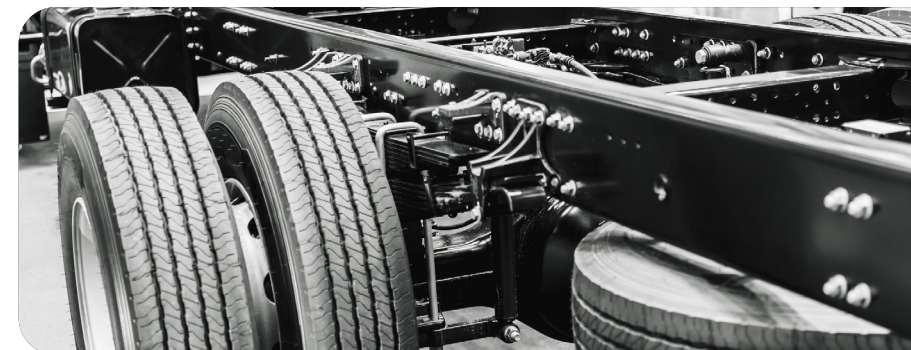


What this means for customers: importers face enhanced scrutiny on bonds, valuation, and origin details. OIA's customs brokerage team can help you solidify your documentation and remain compliant.



The U.S. will impose countervailing duties on intermodal chassis and subassemblies imported from Mexico and Thailand. Antidumping duties will be imposed on both countries, as well as Vietnam.

- The U.S. is [accusing](#) manufacturers in the three countries of selling their products below market prices and receiving anticompetitive government support.



EU Rules for Small Parcels Change July 1st

Starting July 1st, 2026, the EU **will introduce** significant changes to its E-commerce customs rules, removing the duty-free threshold for low-value goods. 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.



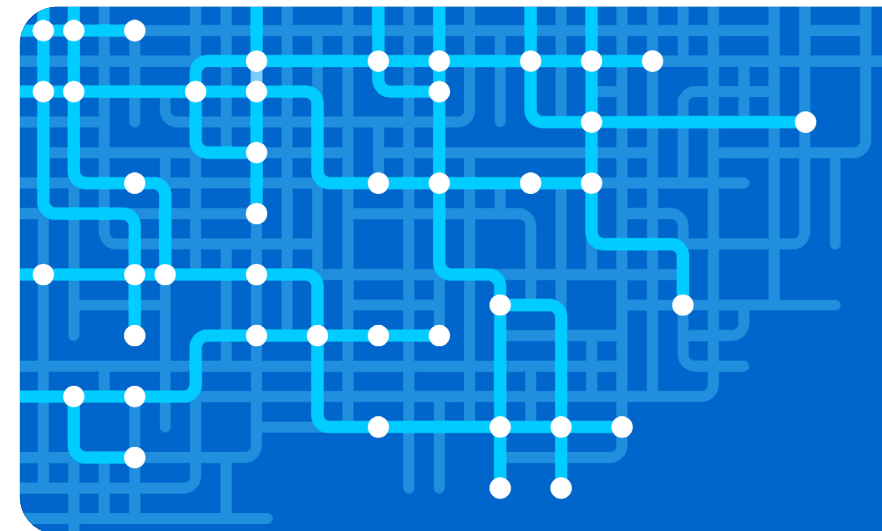
What this means for customers: high-volume, low-value shippers will see an immediate impact on their duty bills. OIA offers customs brokerage consultations to help shippers navigate the EU's complex regulatory environment.



The European Parliament is **enacting** new capacity management regulations throughout the European Union's (EU) rail network. The new rules will factor in the digitalization of train operating systems and impact capacity management during planning, scheduling, allocation, and rescheduling. These changes are expected to unlock up to 4% of additional capacity—equivalent to nearly 250M train-kilometers—and to improve cross-border traffic flows.



As part of its 20th sanctions package against Russia, the EU has **banned** the sale (and future resale) by EU entities of any tankers to Russia. Western sanctions have now banned 632 vessels and 70 banks overall.





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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