



Market Report 7/2026



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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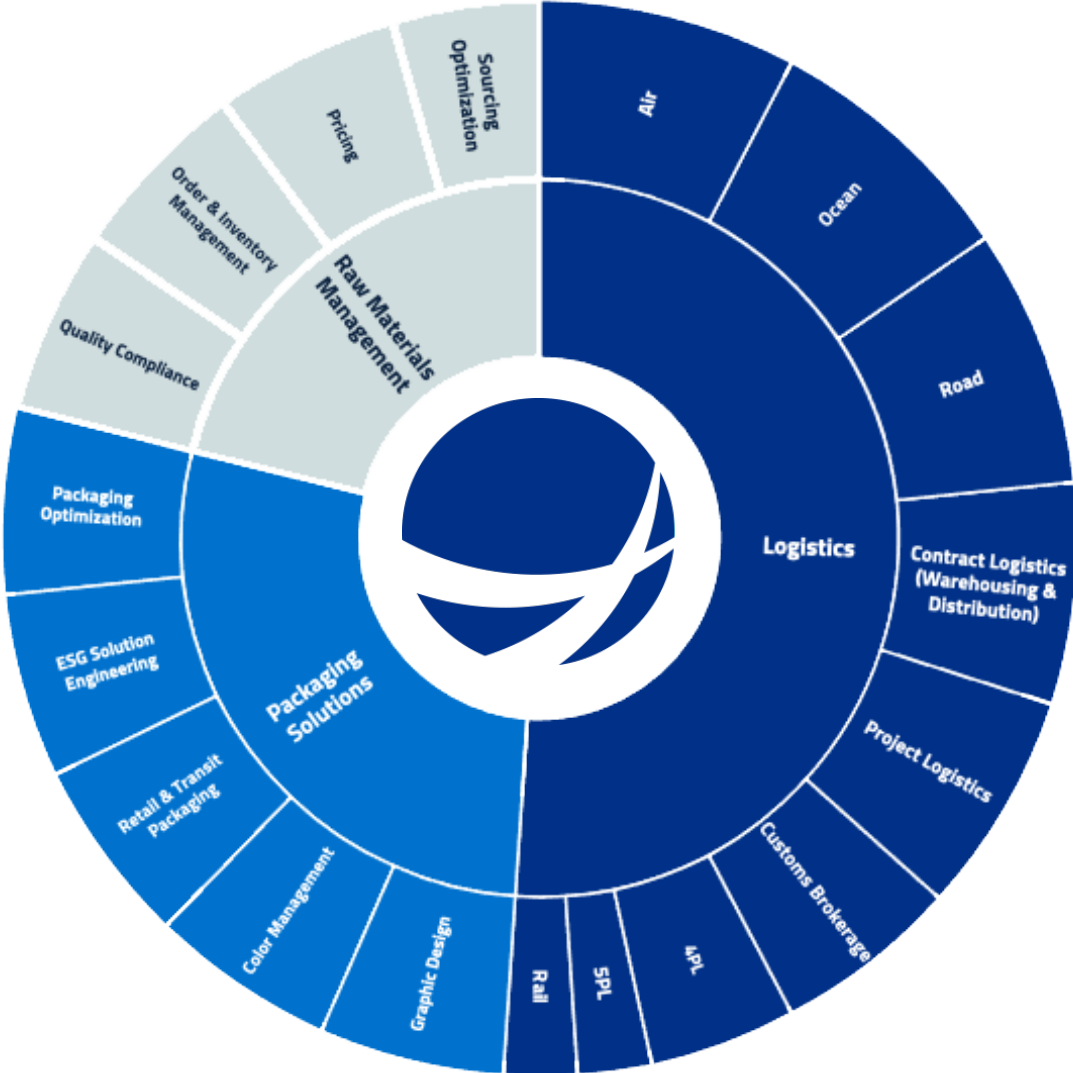
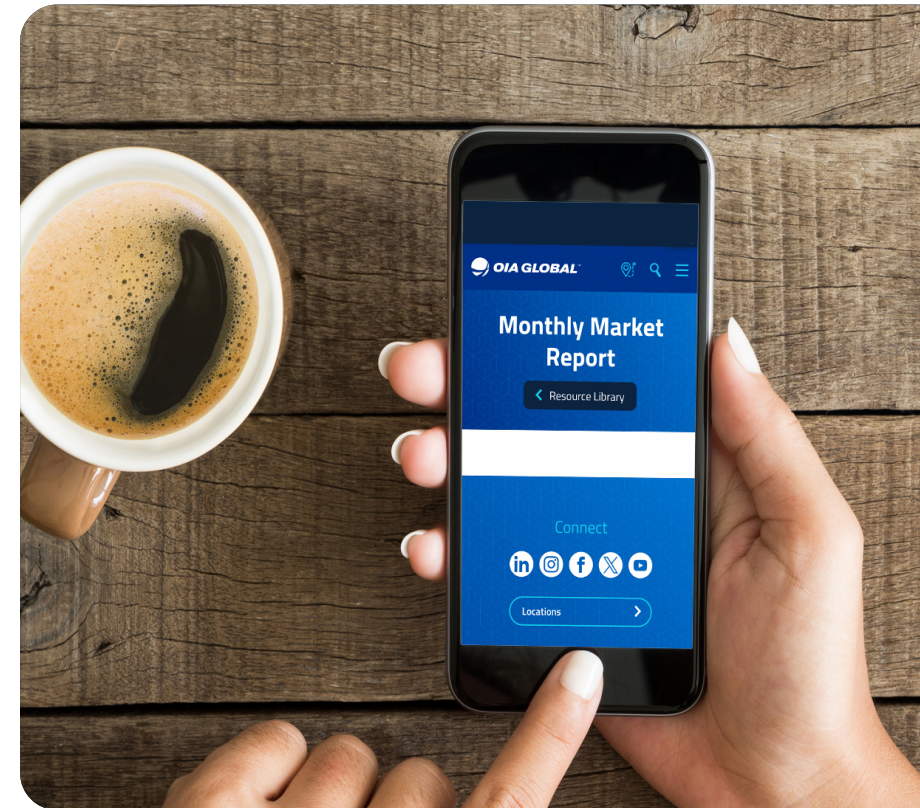


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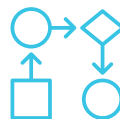
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Vessels **that are** 20+ years old now **make up** nearly 1/4 of the world's containership fleet—the highest share in decades.

Container shipping's traditional hub-and-spoke model is **changing** as carriers are increasingly moving services away from Asia's largest transshipment hubs in favor of smaller regional ports.



High fuel prices and rising truck rates are pushing shippers to **choose** slower, cheaper intermodal options (rail, etc.).



Amazon Supply Chain Services Now Includes Nationwide LTL Freight

Amazon has **expanded** its less-than-truckload (LTL) freight beyond inbound shipments to serve all businesses and destinations nationwide.

This compliments the recent **launch** of Amazon Supply Chain Services (ASCS), when businesses of all types and sizes **gained** access to Amazon's logistics network, including its **entire portfolio** of freight, distribution, fulfillment, and parcel shipping solutions.

Overall, Amazon's network **includes** 200+ U.S. fulfillment centers, 80,000+ trailers, 24,000+ intermodal containers, and 100+ aircraft.



Mediterranean Shipping Company (MSC) has **broken** the record for market share held by a single container line, **reaching** 21.5% of total global container capacity in May '26. The comparable benchmark worth mentioning was Maersk's 19.3% share in 2018.



The air freight market's dynamic load factor (space and weight) on services from Asia Pacific to North America currently **stands** around 90%.

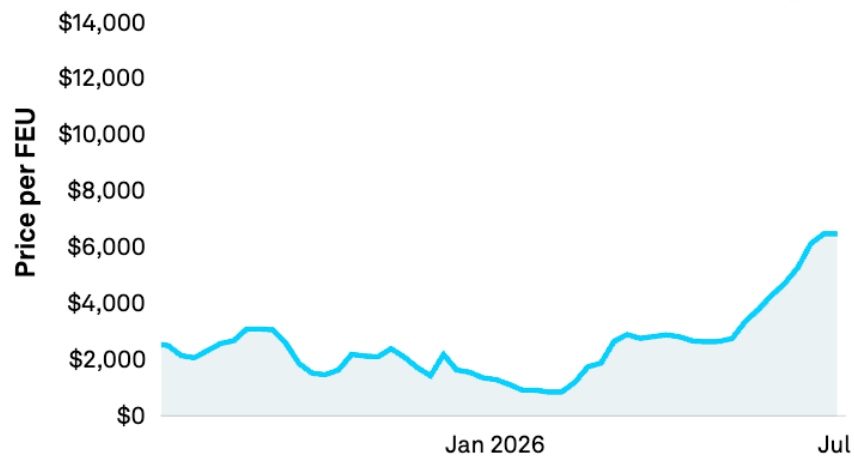
- Semiconductor demand has replaced E-commerce volumes as the main growth driver.
- Airlines are prioritizing long-haul, high-yield routes
- Minor capacity growth is not **relieving** market pressure

Frontloading Creates Early Peak Season

U.S. importers are **frontloading** cargo on the Transpacific eastbound in an attempt to **protect** inventory against potential tariff changes, fuel volatility, and peak season surcharges.

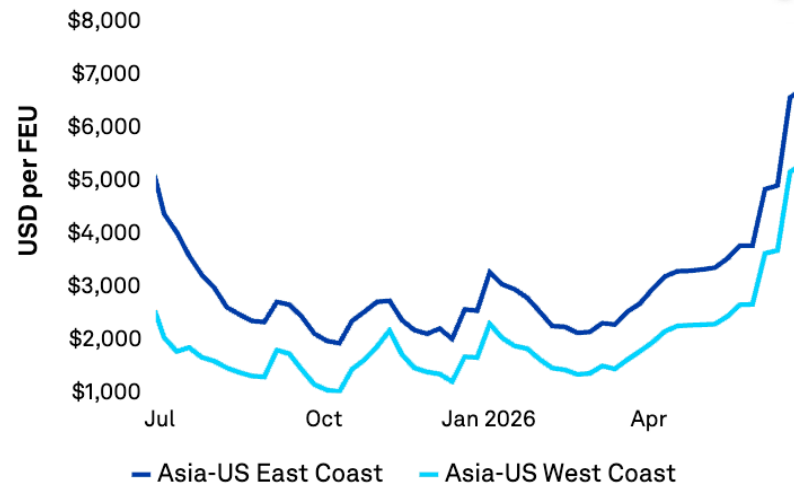
- June '26 import volumes were +14.3% year-over-year (YoY).
- Long Beach **showed** a +31.7% jump in container volumes during May.

Spot Rates: Asia to Mexico/South America West Coasts



Source: Eternity Group, S&P Global.

Spot Rates: Asia to U.S. West/East Coasts

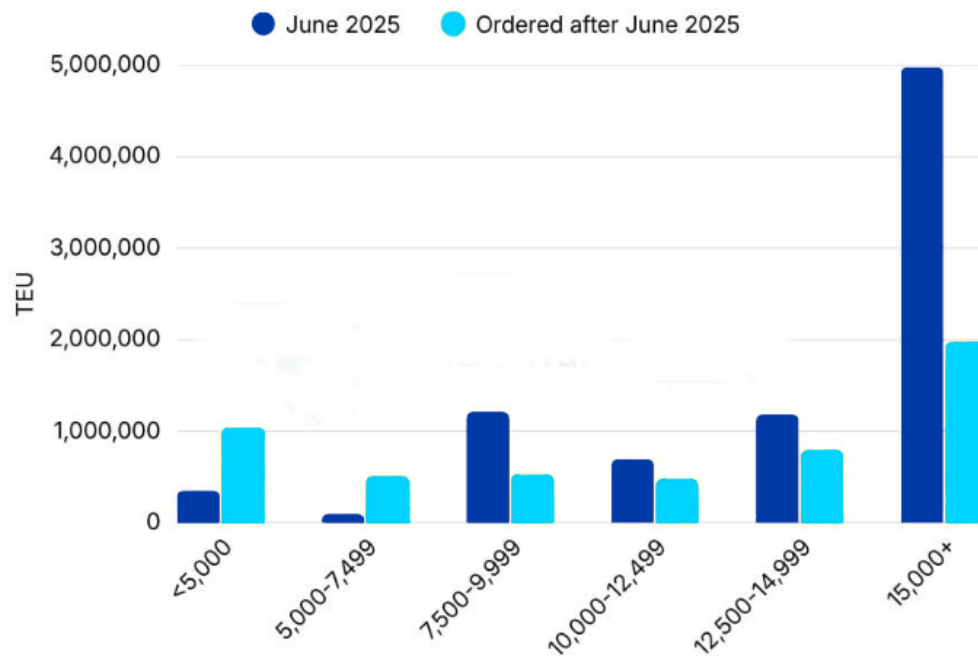


Source: Xeneta, S&P Global.

Carriers Shift Toward Smaller Ships

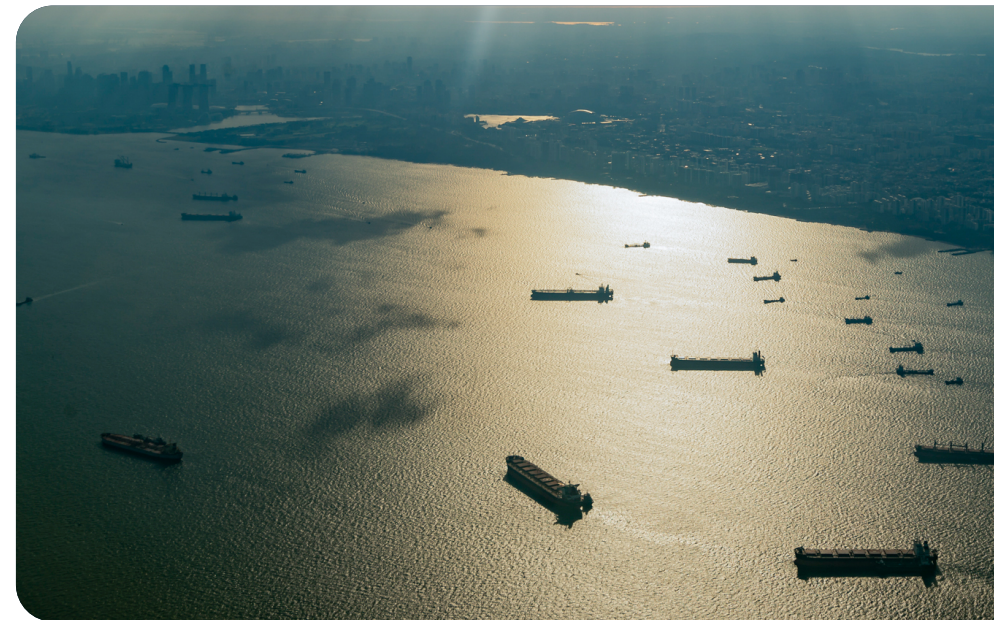


Total Capacity of Ships on Order (By Size)



Source: MDST Containership Databank, SeaTrade Maritime.

Carriers are **opting** for smaller and medium-sized tonnage and turning their attention away from megaships. **Since July '25, around 74% of all orders have been for ships <6,500 TEUs.**



Overall, the orderbook still **remains** heavily weighted towards larger ships due to the orders placed in '23 and '24. Once those vessels are delivered, capacity in the 18,000+ TEU segment will be roughly double as compared to today.

Market Trends: Middle East Fuel Crisis



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*"This agreement should be greeted with realism and extreme caution. Even if the ceasefire holds, around 10% of global container shipping capacity is **impacted** by the blockade, and freight rates are spiraling across major trades. This scale of disruption and market volatility cannot be reversed overnight."*



- Peter Sand, Chief Analyst at Xeneta

Jet fuel prices have dropped as traders prepare for a resumption of exports from the Middle East. The cost ratio of jet fuel compared to crude oil has plunged, but the margin is still significantly higher than pre-war levels.

Jet Fuel NWE CIF Cargoes vs. Crude Oil Dated Brent FOB NWE

European jet fuel prices have retreated sharply in recent months

North-west benchmark, \$ per tonne



As prices rose, the U.S. and Nigeria began **exporting** more jet fuel to Europe and Asia, while refineries across the world increased production. This largely **saved** Europe from a widespread jet fuel crisis and brought some relief to airlines facing billions of dollars in extra costs.

More Information

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.



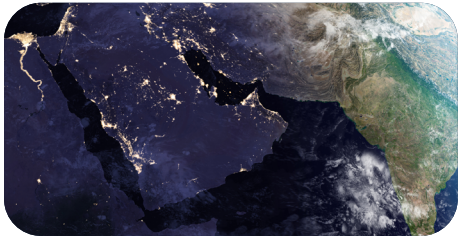
Atlantic

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

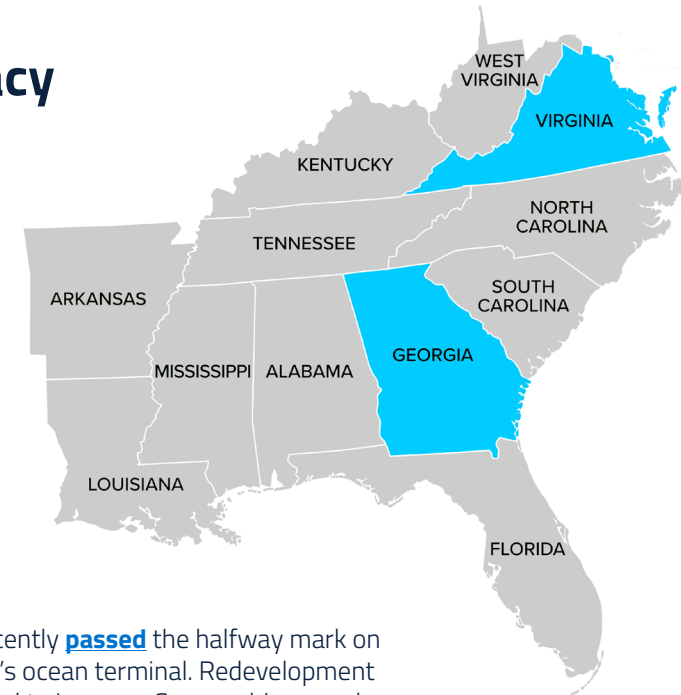
Unlocking emerging opportunities between **Asia and South America**.



Virginia/Georgia Compete for East Coast Port Supremacy

After **completing** a \$450M harbor deepening and widening project, the Port of Virginia (Norfolk) officially has the deepest commercial shipping channel on the U.S. East Coast at 55'. The expanded waterway **allows** for two-way traffic of ultra-large container vessels (ULCVs)—typically 14,500- to 24,000-container capacity.

- The program includes a fully operational \$83M rail expansion, which will boost annual capacity to 2M 20' TEUs.
- \$220M conversion of the Portsmouth Marine Terminal into a deepwater heavy-lift facility.
- \$650M renovation and reconfiguration of the North Berth at Norfolk International Terminals remains in progress, with completion expected in mid-2027.



CMA CGM **signed** an agreement with Oman's Asyad Group to develop and operate a new multipurpose logistics terminal in Sohar, one of Oman's main logistics hubs.



Turkey's Minister of Transport & Infrastructure, Abdulkadir Uraloğlu, **says** a direct rail connection between Saudi Arabia, Jordan, Syria and Turkey will happen "within the next three or four years," following the signing of several documents related to the project. Roughly 400km of new infrastructure is expected between Syria and Jordan.

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.



The Port of Brownsville (Texas) completed its \$295M Brazos Island Harbor Improvement Project, which **deepened** the channel's main navigation route from 42' to 52' while also increasing the entrance and jetty channels from 44' to 54'.

Vietnam's Logistics Sector Expands Rapidly

Vietnam's government [approved](#) a new container terminal near **Danang**, the country's third-largest city. Maersk subsidiary APM Terminals and local infrastructure developer Hateco Group have been awarded a 50-year lease to develop the \$1.7B Lien Chieu Container Port.

- In its first phase, the deep-sea port will have an annual capacity of 4M TEUs, a total quay length of 2,750 meters, and eight container berths capable of handling vessels up to 18,000 TEUs in size.
- Once fully developed at the end of phase three, the port will have an annual capacity of around 5.7M TEUs.



Maersk and Vietnamese conglomerate Hateco are [planning](#) to build a new port project in **Hanoi**. The Giang Bien inland terminal would [support](#) freight transport to nearby industrial zones and strengthen links to the Lach Huyen port complex in Haiphong. The project will be developed over a 239,000-square-meter site in two phases, comprising six berths for general cargo and container vessels, along with storage yards, internal roads and supporting infrastructure.

- **Berth Infrastructure:** A 600-meter berth designed to accommodate vessels with a deadweight tonnage (DWT) up to 3,000 tons.
- **Throughput Capacity:** Target operational capacity is 1.0M tons per annum by 2030.



Landlocked Laos [will gain](#) direct access to a major port as a new 562km standard-gauge railway in the Laotian capital (Vientiane) will connect with the Vung Ang deep water port on the coast of Vietnam. Daily freight traffic is estimated at >5,000 tons initially, rising to 47,133 tons later.



For intra-Asia trade, China-Vietnam trade flows remain salient, with volumes growing 16% last year to 2.8M TEUs.

Vietnam has [overtaken](#) China as the top source for [electronics](#) into the U.S., although the core production of those electronics is still happening in China.



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

EU/USA Trade Deal Ratified

The EU/USA trade deal will finally **move forward** after the EU bloc gave its final sign-off, **ending** a year of ratification talks.

- The EU will eliminate tariffs on U.S. industrial goods and some agricultural products in exchange for a 15% tariff ceiling on its exports to the U.S.
- The two sides are still at odds over issues like metals, tariffs, and tech regulations.

EU Still Remains the Biggest Source of U.S. Imports

Partner	US imports value	Share of total US imports
European Union	\$303B	20.2%
Mexico	220	14.6
Canada	169	11.2
China	149	9.9
Switzerland	72	4.8
Vietnam	71	4.7
Taiwan	65	4.3
Japan	63	4.2
South Korea	53	3.5
India	47	3.1

Note: Figures are sums of January-May 2025. Source: U.S. Census Bureau, Bloomberg.

U.S. Strengthens Customs Capabilities & Federal 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).

- IOR is required to [maintain](#) a minimum level of tangible domestic assets, bonds, or both, to ensure compliance with U.S. trade laws. Increases the minimum required bond coverage for an IOR.
- IOR is [required](#) to provide CBP with additional data: anticipated import volumes, year organized, ownership and beneficial ownership disclosures, business affiliation disclosures, domestic asset disclosures, etc.
- Creates stricter rules for foreign IORs and companies importing higher volumes of low-value articles.
- Foreign IORs can [no longer use](#) an informal entry process for low-value imports and must meet stricter formal-entry requirements. Cannot rely on continuous customs bonds without CBP's approval.
- IORs may be required to participate in or use brokers that are validated through CBP's [C-TPAT program](#).
- Establishes heightened import disclosure and certification requirements: foreign tax and global business identifiers, detailed information about the imported good's supply chain and production methods, such as the manufacturer's product identifier (e.g., model or style number) or key specifications (e.g., composition, grade, or size).



Enhanced Enforcement Measures

- 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.

DOJ Trade Fraud Task Force

[Additionally, the U.S. Department of Justice \(DOJ\) has established a Trade Fraud Task Force to address these critical issues:](#)

- Illegal transshipment maneuvers [used](#) to mask the true origin of goods
- Insufficient customs bond requirements (misclassification or undervaluation)
- Importers' use of shell companies
- Products produced by forced labor

[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

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Onboard Carbon Capture & Storage



Onboard carbon capture and storage (OCCS) systems are ready for ships but are constrained by the limitations ashore. The ships still require proper port-side infrastructure, access to storage, and carbon accounting methodologies

- The shipping industry needs to reach consensus on the economics of captured CO₂— getting it off the ship and into a verified value chain. Whether the captured CO₂ is classified as waste, a commodity, or something else will determine what that market is worth.
- The benefit of OCCS is that it's very traceable and measurable. Alternative fuels often carry layers of upstream opacity that make lifecycle emissions difficult to track. A capture system generates a far tighter, more defensible data chain from the exhaust inlet to permanent storage.

The International Air Transport Association (IATA) has been extremely critical of Sustainable Airfreight Fuel (SAF) production, usage, and targets, particularly throughout Europe.



The 2030 e-SAF targets by the UK and the EU are beyond unrealistic—they are utterly detached from reality. It is a reckless energy market creation strategy to impose mandates before production is enabled. Such a strategy will only drive up the price. Coupled with penalties, it diverts scarce resources from being allocated to actual CO2 emissions reductions.

- Marie Owens Thomsen, IATA's senior vice president of sustainability and chief economist.

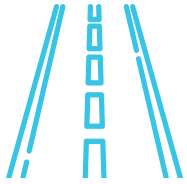


Long Beach Enacts Different ESG Initiatives

The Port of Long Beach continues to enact strategic ESG initiatives as part of its long-term objective of becoming the world's first zero-emissions port.

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.
- Financially **incentivizing** trucking companies that deploy zero-emission vehicles at their marine terminals.
- Establishing a "green trucking corridor" **between** Los Angeles and California's central valley.



Volvo Leading the Way in Autonomous Trucking

Volvo will start driverless trucking operations on U.S. highways soon, with 300+ autonomous rigs expected to be operational by the end of 2027. Volvo **expects** revenue from autonomous transportation to reach \$3B within five years.

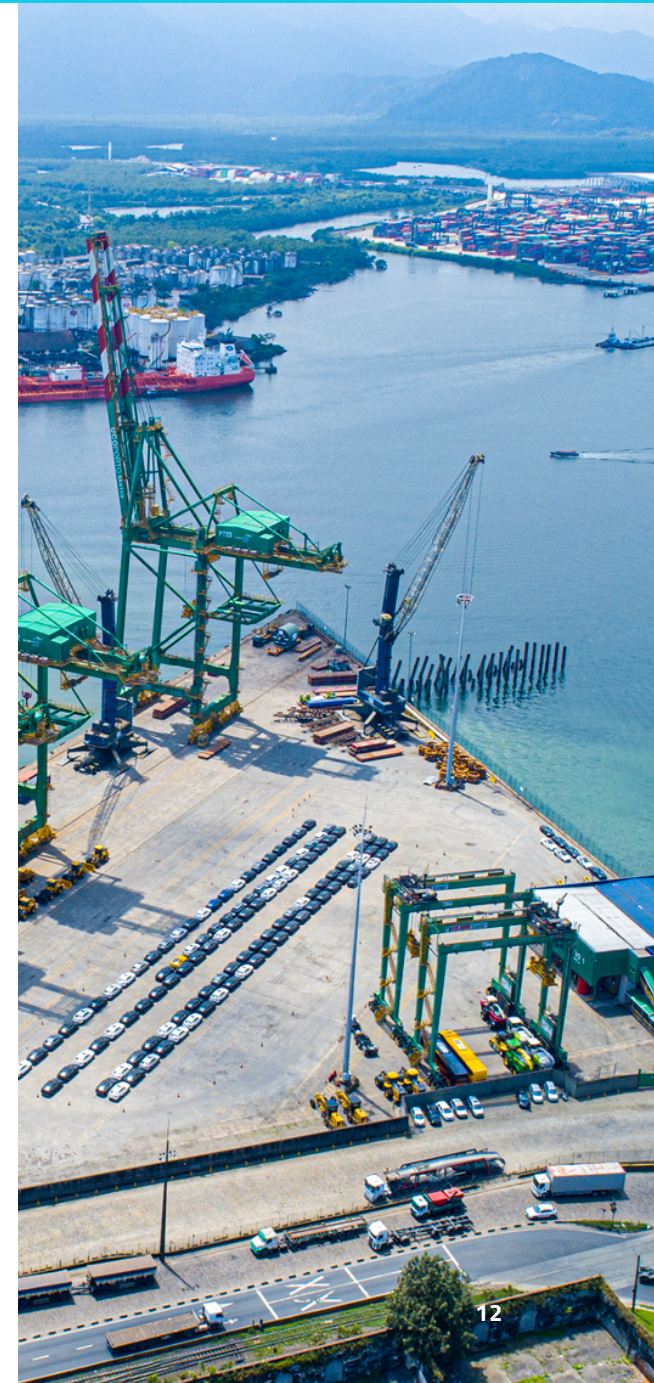
- Waabi's AI-powered virtual driver can now **operate** a new truck platform without requiring additional training, engineering, or data collection—it allows a single AI driving system to transfer seamlessly between different vehicle platforms. This is an important step toward making autonomous trucking technologies scalable and commercially viable.
- Volvo and technology firm AVI-SPL are currently **testing** a route between Dallas and Houston, Texas, to see how their autonomous vehicles **perform**.



Samsara has **introduced** a smart tracking label that creates a new, lower-cost option for continuous shipment monitoring. This printable, single-use sticker can stick to a package or pallet and connect with millions of other Samsara devices installed on trucks, trailers, vehicles, and other equipment. The disposable labels have no lithium or hazardous materials, so they can be used for air, ground, and rail shipments, on virtually all major U.S. roads and at facilities across the country.



China Airlines added an AI customer service assistant for its cargo business. The service connects with air cargo scheduling systems to provide three core services: flight information, shipment tracking, and cargo regulations. It should also speed up answers to customer inquiries.





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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