



Market Report 9/2026



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

Contact OIA



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38.7%

Bottlenecks Move from Sea to Shore

- **Data shows 4.3M TEUs is now waiting to berth at container ports due to port congestion.** This volume of stalled container capacity is a new record globally, **breaking** the previous record set during the COVID-19 pandemic.
- **The orderbook-to-fleet ratio is 38.7%.** The orderbook is heavily **skewed** toward large mainline vessels rather than feeders and smaller regional ships.



- Congestion is **idling** about 1.7M TEUs—enough to rank as the world's 8th-largest carrier—while late ships are running 5-5.5 days behind. These issues are becoming structural, and rates will increasingly depend upon port and inland capacity, not the number of ships deployed.
- **Ocean shipping fees are outpacing fuel costs:** marine fuel costs increased about 30% this year while some container shipping fuel surcharges rose as much as 75%.

Panama Canal Recent Changes

Amidst heavy demand and persistent drought conditions, the Panama Canal Authority is making significant changes to the waterway:

- Allowing the same customer to secure more than one NeoPanamax booking slot for the same date, or to book slots for two or more consecutive dates.
- Lowering the waterway's draft (underwater depth) to compensate for drought conditions: the maximum draft is 47.5 feet (14.48 meters) as of September 3rd.
- Cutting daily ship transits: 32 vessels per day starting September 15th, as compared to the current 36.

In response, ocean carriers are increasing container fees since vessels must carry less cargo, so their hulls can accommodate the shallower draft.

The graphic shows the average auction price for transit slots on the Panama Canal, by lock size. A shipper recently paid \$5.3M to secure its spot, a new record that broke the previous one set last month.



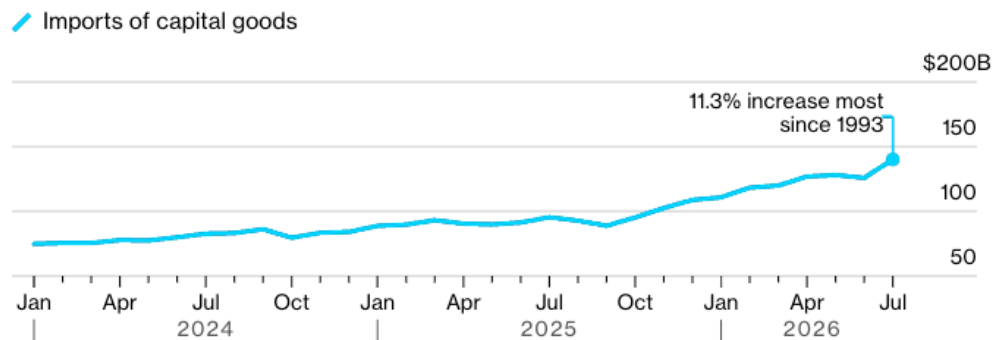
Source: Argus, Financial Times.

High slot reservation prices occur when ships arrive at the Canal without a reservation and then bid against other unreserved ships.

"These are vessels that did not have a slot. They came and waited, and when the slot opened, they bid for it, and they bid against each other. We do not set prices; the market sets the price."

– Ricaurte Vasquez, Administrator of the Panama Canal Authority (ACP)

U.S. merchandise imports climbed 3.7%, fueled by the largest increase in capital goods since 1993. Capital goods include computers and accessories, semiconductors, and telecommunications equipment.

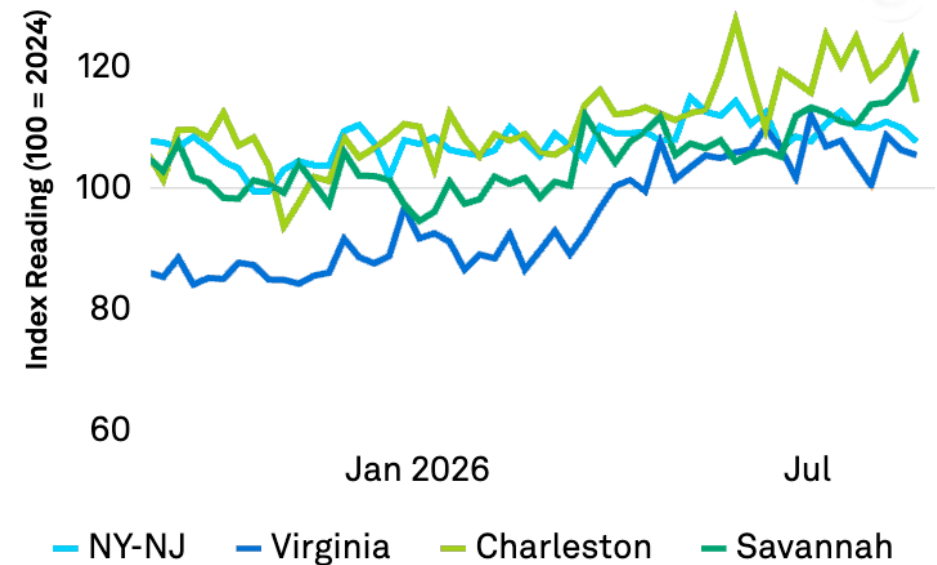


Source: Commerce Department, Bloomberg.

U.S. East Coast Trends

Drayage rates at U.S. East Coast ports have increased due to frontloading and driver shortages.

Rates for the Asia-U.S. East Coast trade are +42% since the start of the Iran war and are now >\$3,300 **higher** than West Coast prices (\$10,527 as compared to \$7,193).



Source: Drayrates-JOC National Drayage Price Index, S&P Global.

More Countries Explore Arctic Shipping

The Arctic is [becoming](#) increasingly attractive as melting polar ice allows more ships to avoid traditional maritime chokepoints. Arctic shipping shortens the journey between Europe and Asia by around 7,000km and 10 days.



The Northern Sea Route (NSR) is broken up into 28 sections with different guidelines depending on the varying ice conditions. Rosatom, a Russian state-controlled company, issues permits to sail through each distinct area.



Sea Legend, a Chinese shipping line, recently [launched](#) a regular cargo service between China and Europe via the Arctic. A 2025 trial crossing saw a container ship [travel](#) from the port of Ningbo-Zhoushan in eastern China to Felixstowe in the UK in 20 days.



President Lee Jae Myung [views](#) Arctic shipping as a priority and [hopes](#) to make it a regular trade route by 2030. Government officials think the NSR could help [strengthen](#) Busan's position as a global maritime hub.



Japan and India have also [expressed](#) interest in NSR shipping opportunities.





Emerging Multimodal Corridors in Southeast Asia

Multimodal solutions are connecting inland production centers with regional markets, giving shippers in Southeast Asia new transportation options, reduced handling requirements, and more efficient connections between factories and ports.

- In the Mekong region, integrated road and rail solutions are providing stronger connectivity between China and its direct neighbors.
- The China–Laos–Thailand railway continues to provide an alternative transportation corridor.
- Cross-border trucking networks between Vietnam, Cambodia, and Laos, are continuing to develop.
- New cross-border solutions linking Cambodia with Laos and onward to China are supporting temperature-controlled cargo.



\$500B

Chinese trade with Latin America has grown from just over \$14B in 2000 to >\$500B in 2024, **overtaking** the U.S. as South America's top trading partner, although the U.S. still remains dominant in Mexico, Central America and the Caribbean.



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.



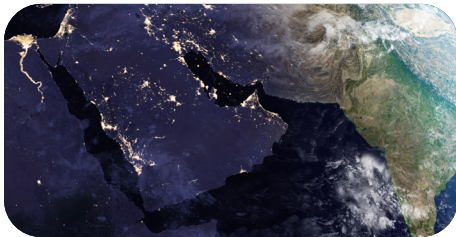
Atlantic

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**.



Louisiana Investments Reshape Gulf Coast Trade

The [Louisiana International Terminal](#) (LIT) is poised to [reshape](#) Louisiana's role in global trade and strengthen its port and logistics ecosystem. The terminal will significantly [expand](#) port capacity and modernize regional logistics infrastructure, connecting key inland markets via road, rail, and river systems.

The U.S. Army Corps of Engineers recently [approved](#) the construction permit for the Louisiana International Terminal (LIT). The LIT project is one of the largest federal investments in a U.S. container terminal to date.



Located in St. Bernard Parish, 16 miles down the Mississippi River from the current port in New Orleans, the new terminal will not have the air-draft limits of the current port. With a 55' depth, the LIT is [designed](#) to berth two neo-Panamax container ships, each with up to 16,000 TEUs of capacity, and will be able to [handle](#) 2 million TEUs annually at full capacity.

The newly proposed St. Bernard Transportation Corridor would create an elevated roadway that connects the 400-acre terminal in Violet, Louisiana, directly to Interstate 510. Designed to facilitate efficient container movement and ease local congestion.



The Port of Klaipėda (Lithuania) is [starting](#) the largest expansion project in its history. The expanded southern port will significantly [increase](#) the port operations and cargo handling capabilities. The port is also [implementing](#) Portchain Quay to digitalize its berth planning processes. The platform is designed to bring berth, cranes, and gang planning into a single operational view.



CMA CGM and Saudi Arabia's main terminal operator, Red Sea Gateway Terminal (RSGT), will jointly [invest](#) SAR \$1.6B (USD \$434M) in Jeddah Islamic Port to [add](#) 2.6M TEUs in annual capacity (currently 6.2M TEUs) as well as 10 new ship-to-shore (STS) cranes.



Brazilian freight operator MRS Logistics has [invested](#) Reais \$2B (\$USD 364M) to expand rail capacity at the port of Santos, adding 40km of new track.



Cabotage Enforcement

U.S. Customs & Border Protection is **cracking down** on federal cabotage laws: drivers from Mexico/Canada can enter the U.S. to transport cross-border freight, but they violate federal law if they stay to haul domestic loads, displacing work that would otherwise go to American truckers.

- 250 fewer Mexican carriers are operating in U.S. commercial zones along the southern border as federal cabotage enforcement has barred hundreds of Mexican truckers from crossing.



The Kenya Revenue Authority (KRA) implemented a new Advance Cargo Declaration (ACD) platform for all containerized cargo destined for Kenyan ports, effective August 3rd, 2026. Under this new regulatory requirement, an ACD Reference Code must be obtained prior to shipment loading and endorsed on the Bill of Lading (BoL).



On July 13th, 2026, the Indian Government **updated** its Foreign Trade Policy to prohibit the import of goods made wholly or partly with forced labor.. **Effective August 12th, 2026, companies trading via India will be required to conduct greater scrutiny of supply chains, sourcing, and due diligence.**

Tariff Updates

All the latest regulations and compliance news can be found on [this webpage](#), including these recent developments.

- **Canada/U.S. trade war**
- **Section 301 forced labor duties**
- **IEEPA refunds & the Consolidated Administration & Processing of Entries (CAPE) system**
- **U.S. Customs updates Post Summary Correction (PSC) procedures**
- **Trump Administration targets Unmanned Aircraft Systems (UAS), also known as drones**

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

[Learn More](#)

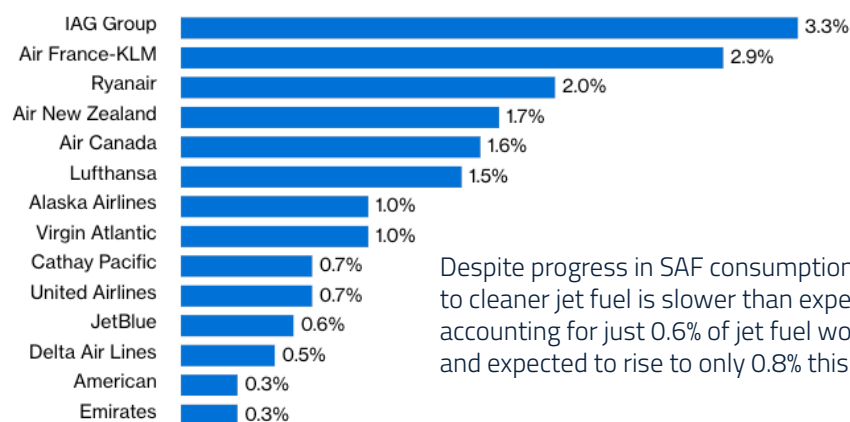
EU's New Packaging Regulations

The EU's new [Packaging & Packaging Waste Regulation](#) (PPWR) will [establish](#) rules throughout the EU and [require](#) retail businesses to use more sustainable packaging standards. Different aspects of the PPWR regulation will be phased in over time.

- All packaging must be recyclable by 2030
- Harmonizes packaging standards across EU countries, reducing fragmentation
- Reduce PFAS "forever chemicals"
- From 2028, there will be a harmonized labelling system for packaging to [facilitate](#) waste sorting and improve the efficiency of recycling.



SAF Adoption by Airline



SAF as a percentage of jet fuel in 2025

Despite progress in SAF consumption, the global shift to cleaner jet fuel is slower than expected, with SAF accounting for just 0.6% of jet fuel worldwide last year and expected to rise to only 0.8% this year.



A new government partnership, the [British Columbia to Baja California ZEV Corridor](#) (BC2BC), will test battery-electric and hydrogen fuel cell trucks along a West Coast corridor. California, British Columbia, Oregon, Washington, and Baja California are coordinating technical standards, infrastructure planning, and other requirements so that trucks can use charging and fueling infrastructure across jurisdictions.

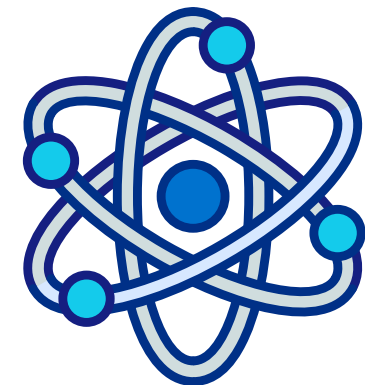
U.S. Investing in Nuclear-Powered Vessels

The U.S. Department of Transportation's Maritime Administration (MARAD) is [working 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 and is actively soliciting information about the regulatory, shipyard, insurance, and port frameworks needed to make it happen.

- The U.S. government [signed](#) a public/private agreement with Core Power to accelerate development of nuclear propulsion for shipping. The agreements will design a regulatory framework that enables speedy licensing, availability of insurance, port access, and high standards of safety.
- The collaborators hope to build [a fleet](#) of 50 nuclear-powered merchant vessels—a mix of LNG tankers and container ships.

The ports of **Long Beach (CA)** and **Corpus Christi (TX)** have [established](#) testing areas and frameworks for exploring nuclear-powered vessels and shoreside applications.

- The Port of Long Beach has [become](#) the first U.S. seaport to formalize a partnership with MARAD and [test](#) SMRs for commercial vessels and other potential uses. The Coast Guard, the Department of Energy and the Nuclear Regulatory Commission will [collaborate](#) to define operational protocols, safety standards and inspection processes needed to support the safe arrival and servicing of SMR-powered vessels at U.S. ports, as well as to develop and share other best practices.
- Corpus Christi [offers](#) a different operating environment: the Texas port is the nation's largest petroleum export port and a major LNG gateway, making it a good location for studying how advanced nuclear power could support energy-intensive port and industrial operations.





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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