



Market Report 10/2025



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 every customer's path to success.



1,100+
Employees

60+
Offices

30+
Countries

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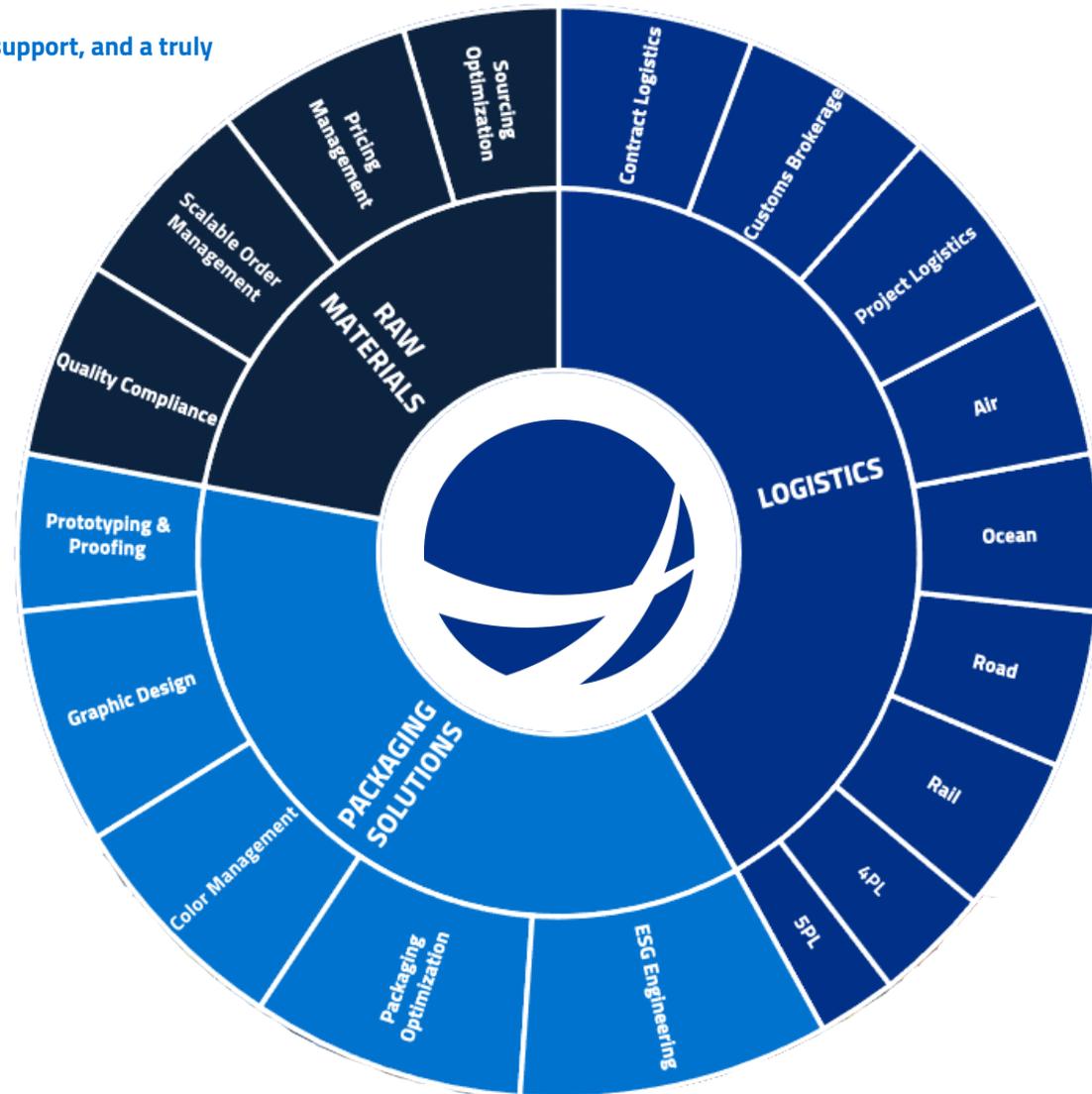


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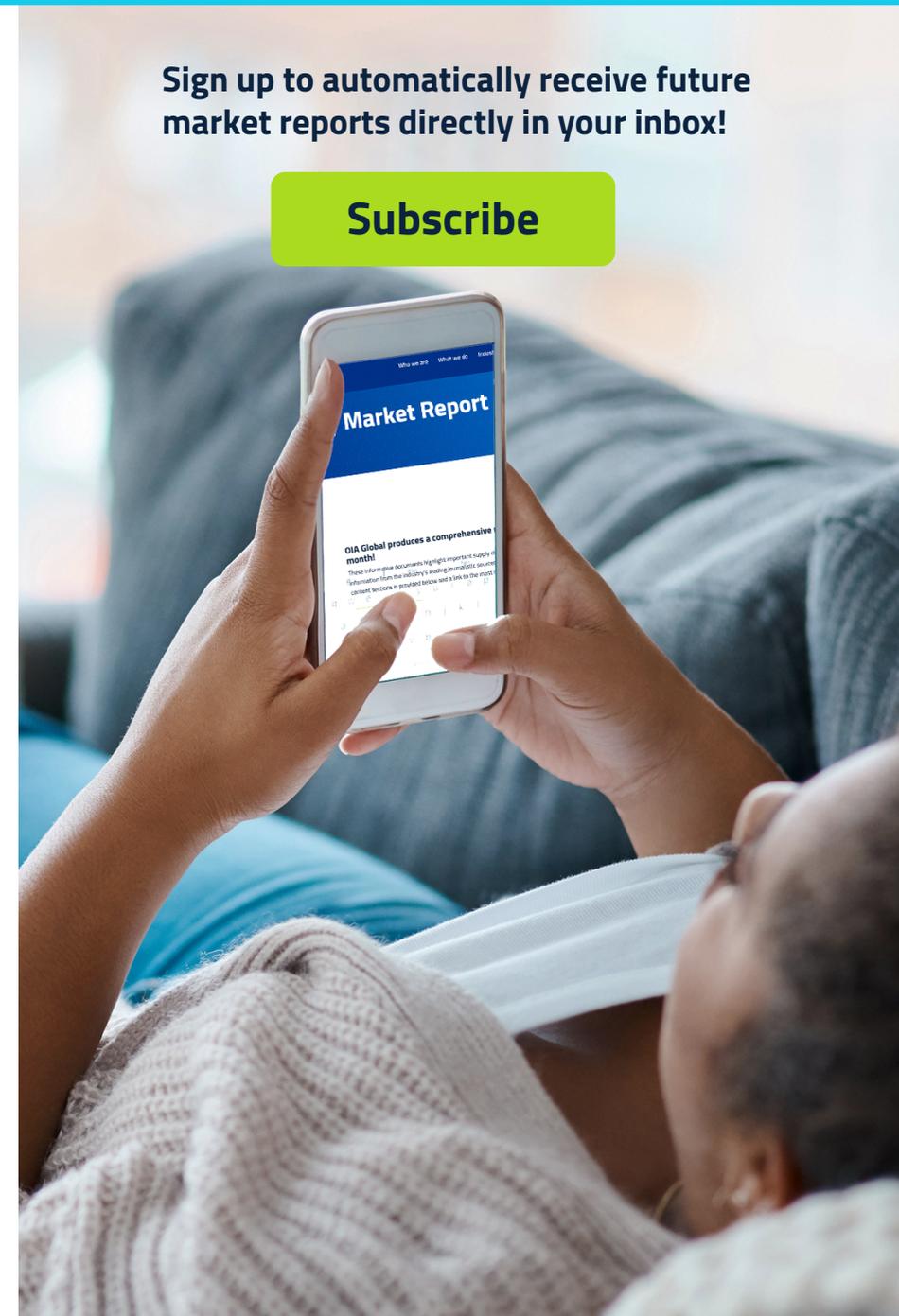
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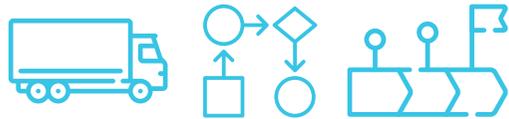
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41%  

New analysis **shows** that roughly 41% of containers moving throughout the world are empty, a sign of ongoing equipment imbalances, which could raise freight costs and tighten space availability on key trade lanes.



The U.S. trucking industry is **shifting** toward more regional hauls with shorter routes and hub-and-spoke operations, improving speed and reliability in local markets but also tightening long-haul capacity.

Of the 630+ large wide-body air freighters in operation, about 150 are **nearing** or have entered retirement age (25+ years), which could gradually tighten global air capacity.



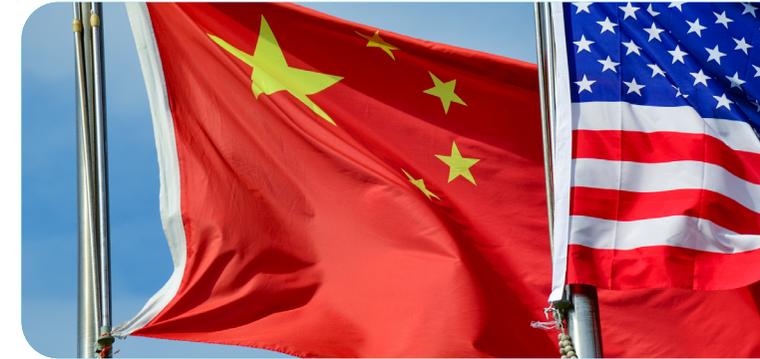
The Chinese air freight market is **shifting** away from the U.S. **toward** Europe, with August '25 cargo volumes -5% year-over-year (YoY) to the U.S. but +11% to Europe, signaling a change in demand patterns and trade flows.

- Overall, air freight demand remains resilient on key trade lanes.
- Intra-Asia routes are performing strongly, rising 12.4%.

USTR Port Entry Fees for Chinese-Linked Vessels Starts Oct. 14th

The U.S. Trade Representative (USTR) **introduces** new port entry fees for Chinese-linked ships on October 14th, 2025. The new rules **targeting** vessels with Chinese associations are set **to impact** global shipping patterns significantly.

- Some of the world's largest maritime operators, including major container shipping lines, are trying to **exit** their China-linked leases to **avoid** these impending fees.
- COSCO Group, ZIM, ONE, and CMA CGM stand to be most severely **impacted**.



In retaliation, China is **considering** new regulations and may impose its own punitive port charges and restrictions on U.S. shipping services. The language in the amendment is vague and **doesn't specify** how China would determine whether a ship is considered to originate from the offending country.

- The charges start at \$50 per net ton and rise to \$140 by 2028. For vessels built in China but not controlled by Chinese interests, separate fees will also apply: the greater of \$18 per net ton or \$120 per container, reaching \$33 per ton or \$250 per container by 2028.**
- Non-payment may block cargo operations and port clearances via immediate operational bans.



- U.S. Customs & Border Protection (CBP) is the **designated collector** of the new fees, with a new Pay.gov payment portal for such remittances.
- According to a CBP notice, the burden for determining if a vessel owes these fees falls squarely on vessel operators, not CBP, adding additional compliance pressure on shipping lines and operators with any Chinese connections.**

*"A shift is bound to happen where those **ordering** 100% of ships from China until now might do 60-70% with China and 40% with Japan or South Korea."*

- Hitoshi Nagasawa, President of the Japanese Shipowners' Association



India Invests in Domestic Maritime Capabilities

India's government approved a \$7.86b package aimed at rejuvenating the country's shipbuilding capabilities and overall maritime ecosystem. India's maritime investment roadmap **targets** port and cargo terminal development, multimodal transport hubs, shipbuilding, ship recycling and repairs, as well as investments in green hydrogen, bunkering and sustainable shipping.

- Introduces a shipbuilding development scheme (SbDS) with a budget of R\$199.89b (USD \$2.25b) **to expand** domestic vessel construction capacity to 4.5m gross tons annually.
- Five newly passed legislative acts—the Bills of Lading Act, Carriage of Goods by Sea Act, Merchant Shipping Act, Coastal Shipping Act, and Indian Ports Act—are part of India's plan **to update** its maritime laws from the era of British governance.



"These opportunities open up a \$1 trillion maritime investment roadmap, with strong potential for joint ventures in developing ports and cargo terminal operations, multi-modal terminals, maritime services, shipbuilding, ship recycling and ship repairs, green hydrogen hubs, and sustainable shipping solutions."

- Sarbananda Sonowal, Union Minister for Shipping.



South African Logistics Recovery Plan Makes Progress

Beset by corruption, theft and dilapidated infrastructure, South Africa's government is **shortlisting** private companies to operate on the nation's rail and port network (Transnet) and help improve logistics bottlenecks that have weighed on economic growth.

- 11/25 of the private freight operators who have applied for access to Transnet's infrastructure have met the necessary requirements and **will advance** to the next stage of contract negotiations to secure access to routes and corridors. Licenses of up to 10 years will be allocated to firms that make the final cut.
- Transport Minister Barbara Creecy said the selected private operators will carry an additional 20m tons of freight annually from the 2026-27 financial year onward, which could unlock as much as R\$100b in new investments.



More Countries Target Arctic Shipping Routes

South Korea will **begin** pilot operations on Arctic shipping routes in 2026, **creating** a special government task force to **develop** its strategies. China is actively **expanding** its shipping influence throughout the Northern Sea Route (NSR) as well, recently **launching** its first China-Europe arctic express service.

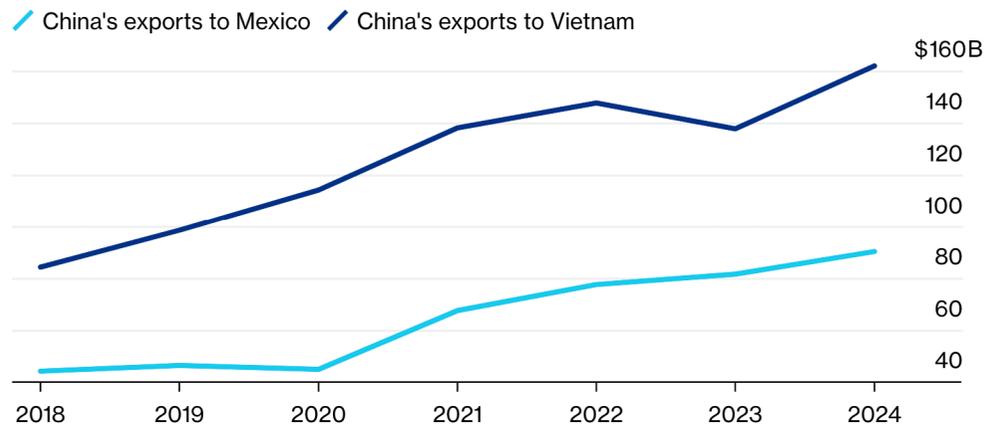
MSC, Maersk, CMA CGM, and Hapag-Lloyd said they will not be interested in using the shipping lane yet. MSC said in a Sept. 29th **advisory**: "The Northern Sea Route remains underdeveloped for commercial shipping since safe navigation and transit are not assured."



Two major hubs for indirect trade to the U.S.—Mexico and Vietnam—are seeing increased Chinese investments and exports.

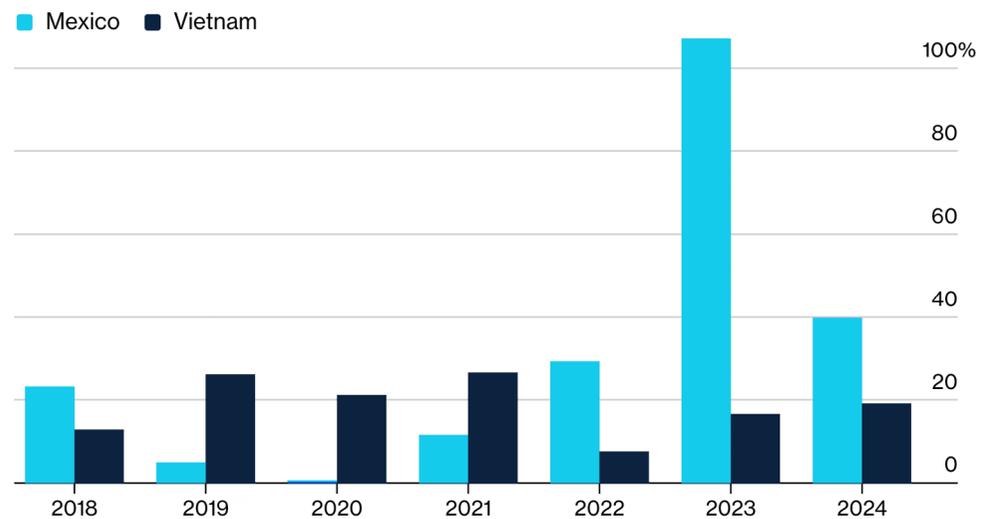
Vietnam has **emerged** as a leading global air freight growth market, with capacity deployed on Vietnam-U.S. routes increasing +95% YoY.

China's Booming Exports: Sales Rise in Both Markets



Source: General Administration of Customs.

China Accelerates Overseas Investment



Sources: Ministry of Commerce, Bloomberg Economics.

International Postage Toward U.S. Halts Amidst *De Minimis* Removal

State-owned postal services and private operators are **halting** low-value shipments toward to U.S. after the Trump administration ended the *de minimis* tax exemption on August 29th, 2025, citing their inability to comply with U.S. Customs & Border Protection's (CBP) timeline.

- **Postal traffic to the country dropped >80% following the *de minimis* suspension.**
- Small and medium-sized businesses will be **burdened** with most of the higher costs accrued from these changes.

Foreign Trade Zones vs. Bonded Warehousing

[More information](#)

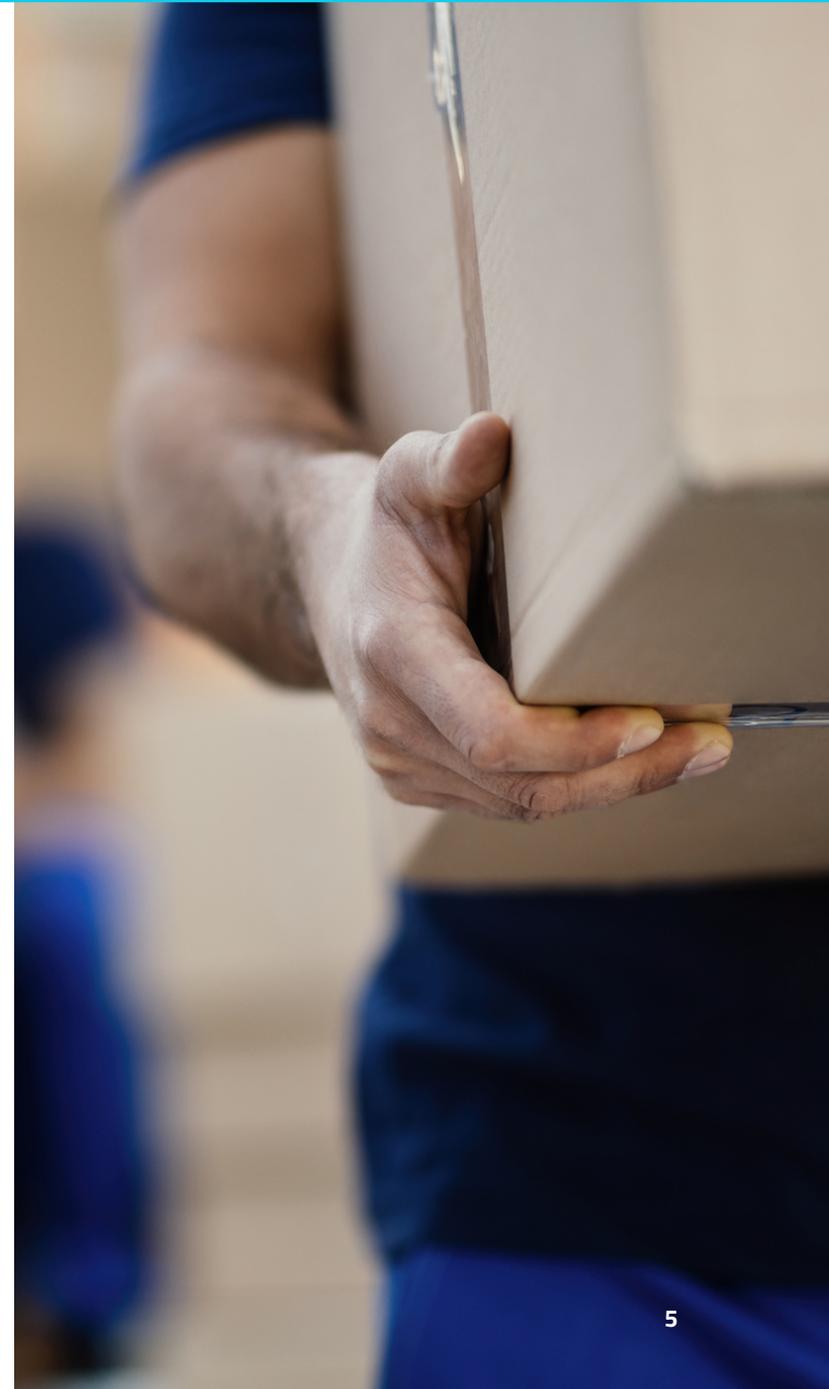
Nearshoring the Supply Chain via Omnichannel Solutions

[Learn more](#)

The Universal Postal Union (UPU—the United Nations' (UN) specialized agency for global postal cooperation—is **deploying** a solution to help postal operators resume deliveries to the U.S. The solution **enables** postal operators to access a landed-cost calculator via an Application Programming Interface (API) that can be plugged into their retail and counter solutions. That approach lets postal operators calculate and collect the required duties from customers at origin.

De minimis duty-free treatment under 19 U.S.C. § 1321(a)(2)(C) will **no longer be available** for shipments entering the U.S. not covered by 50 U.S.C. § 1702(b), including those entering through international mail.

These changes increase the need for customs brokerage, bond coverage, and accurate product classification, even for low-value shipments.





NetZero & LoTSA 2.0 Slot Allocations

The Panama Canal Authority (ACP) opened its NetZero slot allocation program, offering preferential access to dual-fuel ships. Beginning in November '25, one weekly slot will be reserved exclusively for vessels that meet low-emission criteria.

- To qualify, vessels **must be equipped** with dual-fuel engines and use fuel with a carbon intensity of less than 75 gCO₂(e)/MJ, measured from extraction to combustion (well-to-wake). Notably, this slot will not be offered through an auction but through a competition in Period 1A, held 30 days before the transit date.

ACP also launched its Long-Term Slot Allocation 2.0 (LoTSA 2.0) program for booking transits. LoTSA 2.0 packages transition from a 12-month horizon to a six-month offering, giving shippers more flexibility.



Strategic Infrastructure Investments

Over the next decade, the Panama Canal Authority plans **to invest** >\$8b in strategic projects in four key sectors:

- **Water availability and security:** The plans call for a new reservoir that would provide water for both the canal and human consumption.
- **Liquefied Petroleum Gas (LPG) pipelines:** The Panama Canal's new energy pipeline project **will transport** propane, butane, and ethane between the Gulf of Mexico and Northeast Asia, thus freeing up canal capacity without additional water usage. The goal is to enhance the canal's performance by reducing vessel wait times.
- **Roads connecting** the Atlantic and Pacific coasts
- **Terminals** built on either coast, with the terminals able **to accommodate** both containers and roll-on/roll-off (RoRo) cargo.



The JF Moran team is now part of OIA Global. Together, we walk **One Path Forward.**

JF Moran's deep customs brokerage knowledge and high-touch service complement OIA Global's broader logistics infrastructure and global technology platforms. Together we strengthen our ability to support evolving supply chain needs in a complex trade environment.

For more than 85 years, JF Moran has been a trusted leader in customs brokerage and trade services. Everything you relied on JF Moran for is staying the same. You'll continue working with the same people, in the same way, with the same care and attention you've always known. What this change means is added strength: more resources, more expertise, and a broader network supporting the team you already trust.



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ONE PATH FORWARD



The Port of Montreal **plans to develop a new C\$1.6b container terminal that will add 1.15m TEUs to the port's annual handling capacity.** Overall, the Contrecoeur expansion project includes two ship berths, a railyard, and other new facilities which will be **located** 25 miles downstream from Montreal on the St. Lawrence River.

- Canada's Prime Minister Mark Carney **says** that the Port of Montreal's planned expansion is one of the top priorities for the country's new Major Projects Office (MPO).



The British government and private industry **will invest** £1.1b (USD \$1.5b) in the country's ports, with £448m (USD \$600m) for the government's UK SHORE program, which **supports** the research and development of new clean maritime technologies and fuels, **including** electric, hydrogen, ammonia, methanol and wind power.

Gatwick, the UK's second-largest airport, will spend £2.2b **to create** a second runway. The project **will move** the emergency landing strip, which doubles as a runway when the airport's main runway is out of action, 12 meters to the north.



Alabama's Port of Mobile **finished** its harbor deepening project, becoming the first U.S. Gulf Coast port capable of handling super-post-Panamax container ships.



COSCO Shipping and Shenzhen Port Group are **collaborating to develop a high-end, multifunctional logistics park in Shenzhen's Yantian port district.** The joint venture includes the construction of high-specification warehouses, cold chain storage, and consolidation and distribution facilities.



Brazil's Port of Santos is **seeking to develop the largest container terminal in South America.** Tecon Santos 10 would cement the port's status as the biggest gateway on the continent, boosting annual container capacity by almost 60% to 8.73m TEUs and allowing it to handle 20,000-TEUs ships.



Venezuela intends **to restore** freight services on the 307km Barquisimeto/Acarigua-Puerto Cabello soon, although no firm timetable has been set. The reopened line would connect the Batalla de Araure intermodal terminal and dry port north of Acarigua, as well as the dry port in Barquisimeto in Lara state, with the country's largest Caribbean port at Puerto Cabello.



IEEPA Tariffs in Legal Purgatory, Pending Supreme Court Decision

On August 29th, a federal appeals court ruled that many tariffs imposed under the International Emergency Economic Powers Act (IEEPA) exceeded presidential authority. Enforcement of these tariffs remains in place until mid-October, pending a potential Supreme Court appeal. Several measures could be affected if the ruling stands, though other tariffs (Section 301, 232) are based on different statutes and are not directly addressed by this decision.

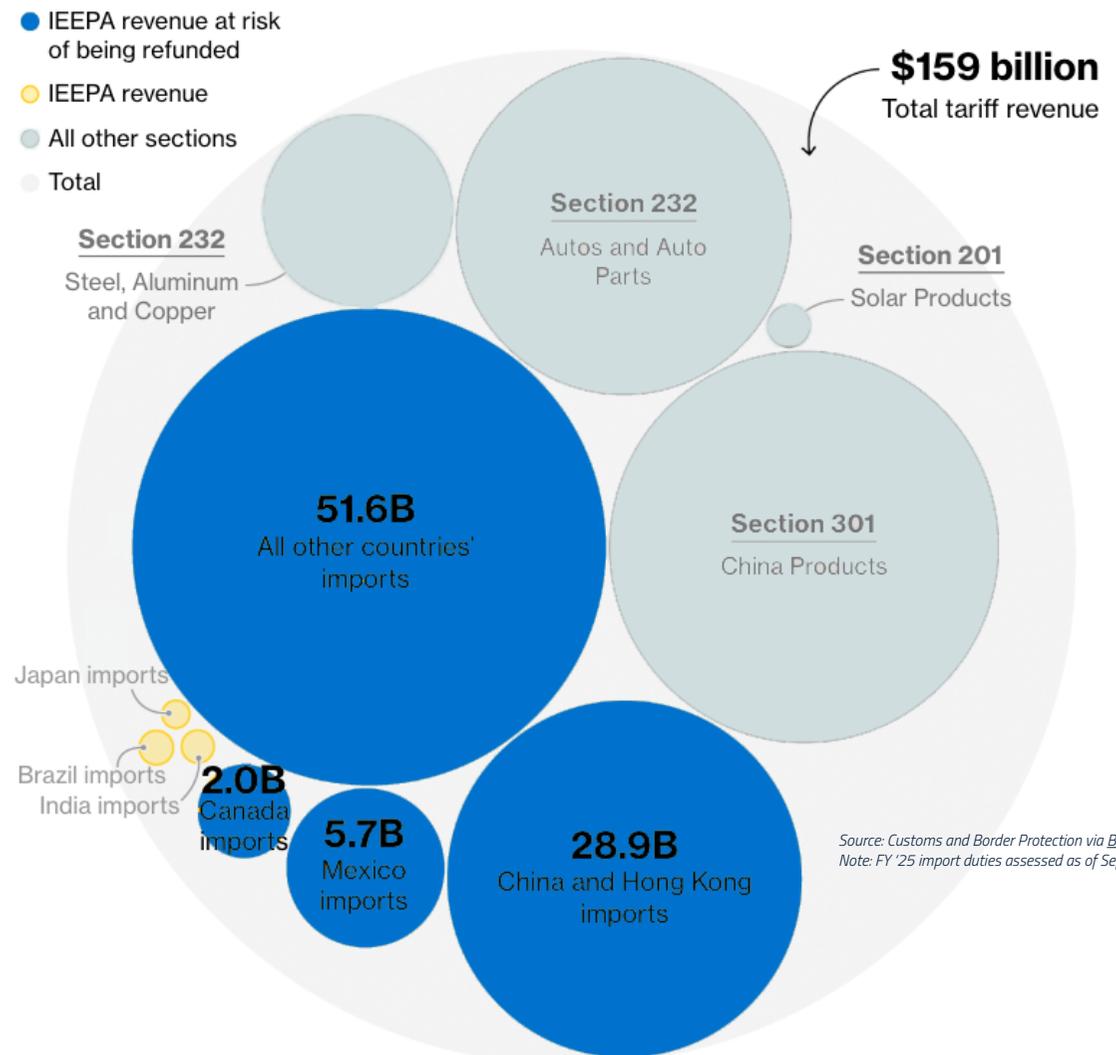
- The Trump administration recently **submitted** a 49-page brief urging the high court to affirm Trump's broad emergency levies.
- Treasury Secretary Scott Bessent warned that if the high court rules Trump did not have the authority to impose the tariffs, the U.S. government could be obligated **to refund** importers anywhere from \$750b to \$1t.

"The shadow of tariff uncertainty continues to weigh heavily on business confidence, investment, and supply chains."

- Ngozi Okonjo-Iweala,
World Trade Organization (WTO) Director-General

More Than Half of Trump's Tariff Revenue at Risk of Refund

If the Supreme court **upholds** the U.S. Court of Appeals ruling, the government would owe the bulk of the >\$165b in customs duties back to companies that paid them.





FMCSA Cracks Down on Commercial Trucking in Multiple Ways

The Federal Motor Carrier Safety Administration (FMCSA) continues [to implement](#) enhanced identity verification processes for new commercial driver applicants:

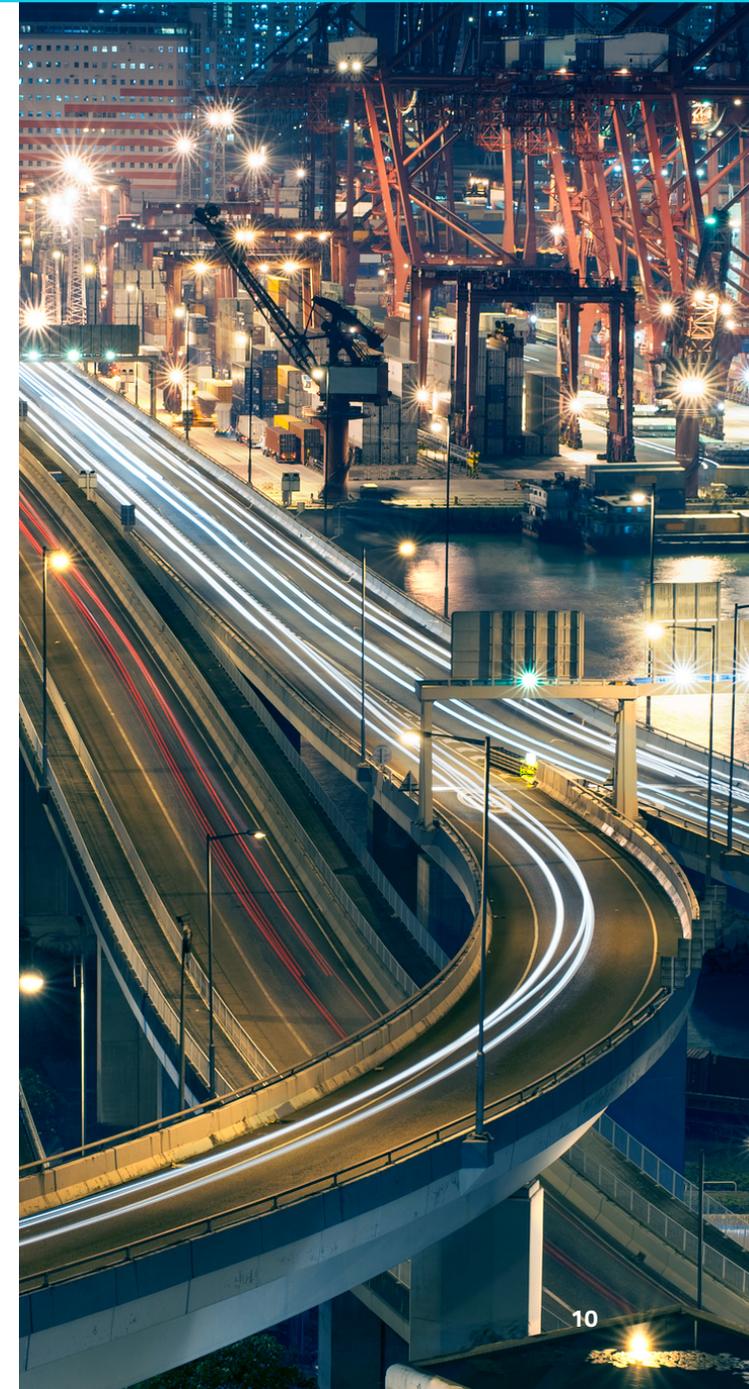
- Requires applicants to match their government documents with a facial scan.
- Requires applicants to provide a valid physical business address, instead of a virtual address (i.e., P.O. Box, USPS box, etc.).



The Trump Administration continues [to target](#) English proficiency requirements, which has had 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.

- Now, the U.S. Department of Transportation (DOT) is [threatening](#) to withhold millions in federal highway funds from specific states, [accusing](#) them of failing to enforce such English-language proficiency standards.

Additionally, non-U.S. citizens are [ineligible](#) to obtain a Commercial Driver's License (CDL), effective immediately.





The U.S. Commerce Department is **expanding** its sanctions to capture subsidiaries of blacklisted companies, preventing them from using affiliates to access restricted U.S. goods. **Subsidiaries that are at least 50% owned by blacklisted companies will face the same curbs as their sanctioned parents, with increased due diligence requirements for shipments linked to such entities.**



The U.S. Department of Transportation (DOT) terminated approval of Delta and Aeromexico's joint venture agreement and withdrew antitrust immunity, according to a press release.

- The Delta/AeroMexico agreement must **wind down** by January 1st, 2026, and both companies will be required to discontinue activities like common pricing, capacity management, and revenue sharing, which require antitrust immunity.
- The U.S. DOT **alleges** that Mexico has been acting outside of a 2015 agreement since 2022, taking slots away from U.S. carriers and restricting air cargo flights at Mexico City's Benito Juarez International Airport.



The United States' 25% duty on both medium- and heavy-duty truck imports is **delayed** until November 1st, 2025.



Australia's federal government **updated** its **National Freight & Supply Chain Strategy** and launched a new National Action Plan for the next five years:

- Develop a National Freight Resilience Plan to ensure a "consistent and coordinated" response to significant supply chain disruptions.
- Create a Freight Infrastructure Investment Framework to guide infrastructure investment decisions
- Conduct safety research on battery and zero-emission traction technologies for freight vehicles, including locomotives.
- Model current and future freight networks to ascertain what is needed to support efficient and effective operations.



The European Union's latest **sanctions package** against Russia **proposes** a ban of Russian liquefied natural gas (LNG) by January 1st, 2027, a year earlier than originally proposed.



The **German Ports Secure Release Order** process **went live** on October 1st. For any cargo arriving at German seaports, a German Ports ID will be mandatory **to obtain** a release before cargo can continue its onward inland journey.

Maersk is **conducting** an ambitious program to retrofit approximately 200 vessels in its time-chartered fleet, **collaborating** with 50 different ship owners to improve fuel efficiency and reduce greenhouse gas emissions.



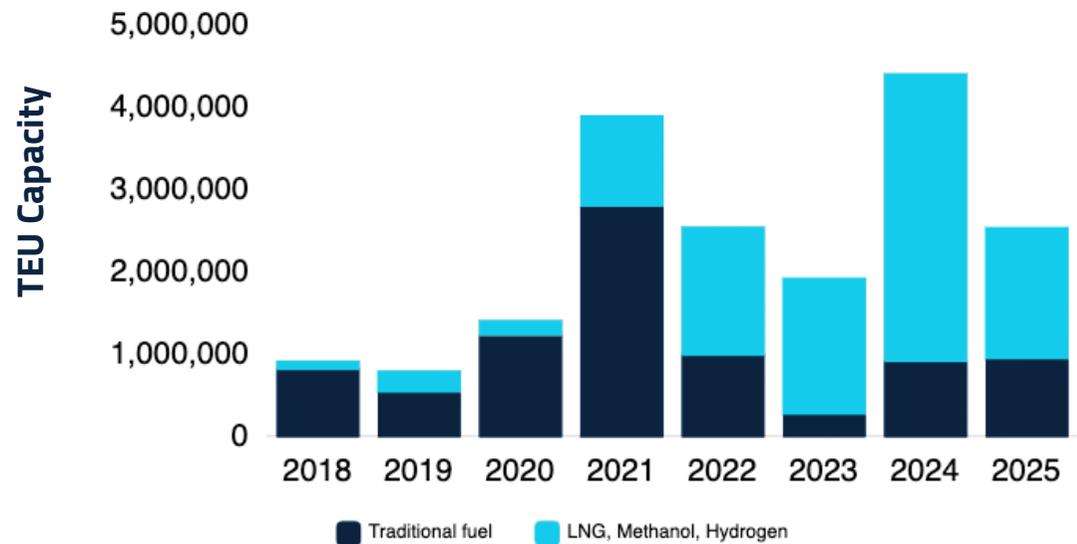
Uber Freight and Tesla want **to accelerate** the adoption of electric vehicles across global supply chains. They are **creating** an all-inclusive program for carriers that will package Class 8 Tesla Semi electric trucks, charging infrastructure and guaranteed freight as a means of speeding up adoption of the manufacturer's often-delayed zero-emission trucks.

Swappable battery packs are **being placed** on Dutch inland cargo vessels as part of a program that provides more powerful containerized batteries for inland ships. The pilot program involves Zero Emission Services (ZES), Nefcargo, and Inland Terminals Group.

A group of 130+ countries is **committed** to participating in the Carbon Offsetting & Reduction Scheme for International Aviation (CORSIA), a United Nations-supported market system that compensates for the international aviation industry's carbon footprint. EU legislators will review the CORSIA carbon tax system periodically and then consider whether to extend the levies to long-haul flights.

Container Ship Capacity on Order (By fuel type)

The container shipping industry is **pivoting** toward cleaner fuels, with more than half of all newly ordered vessels set to run on alternatives to traditional heavy fuel oil. Alternatively fueled vessels account for 81% of all orders for ships with capacities of 8,000+ TEUs.



Source: Sea-web, S&P Global.

Mergers & Acquisitions

CMA CGM Continues to Expand its Influence Throughout the World

CMA CGM has made significant investments over the past few years in air cargo, port terminals, and logistics capabilities as it moves to diversify revenue and exert greater control over global supply chains.

 Recently **acquired** Freightliner UK Intermodal Logistics, **extending** its influence deeper into container shipping and intermodal logistics. The British company **owns** rail and road operations and inland terminals.

 In late 2024, CMA CGM **acquired** a controlling share of Brazil's largest terminal operator Santos Brazil.

 In August '25, CMA **committed** €200m (USD \$232m) to develop Syria's largest container port, Latakia, just after it **announced** €150m (\$177m) of investments in TTI Algeciras where CMA holds a 49.9% stake.



Transport Technology

World Shipping Council's Cargo Safety Program Leverages AI Against Fires

The World Shipping Council (WSC) [launched its Cargo Safety Program](#), combining AI-powered cargo screening and common inspection standards to [identify undeclared high-risk shipments before they are loaded](#). Misdeclared goods also compound the problem; for example, shippers declaring shipments with lithium-ion batteries as 'computer parts' rather than hazardous materials to avoid extra costs.

- A new AI-powered tool will scan millions of bookings in real time, using pattern recognition and algorithms to identify risks. These will be flagged to carriers who can carry out physical inspections if necessary.
- P&I claims [recently hit](#) a ten-year peak, with fires and electric vehicles emerging as major concerns for ship owners.

Two factors are increasing the risk of on-board fires:

- The larger size of container vessels [makes](#) it harder to fight fires
- The global shift toward electrification, as demand for lithium-ion batteries is [forecast](#) to more than double by 2030 to \$322b.



According to a recent [World Trade Report](#) from the World Trade Organization (WTO), [lower trade costs and enhanced productivity could drive substantial increases in trade and gross domestic product \(GDP\) by 2040, with global trade projected to rise by 34-37% under different scenarios.](#)

- Artificial intelligence could also [boost](#) the value of trade in goods and services by nearly 40% by 2040, but without adequate policies it could also exacerbate economic divides.



The European Union (EU) is [expanding rail freight automation via the Digital Automatic Coupler \(DAC\)](#), which integrates an interface for controls, sensors, and actuators between the locomotive and the wagons and between the wagons themselves. The DAC also supplies electrical power from the locomotive and establishes a communication network throughout the entire train, creating interoperability beyond borders.



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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