



3 Airfreight takes a hit
Iran conflict grounds some
3,000 flights



4 The AI Training Gap
Needs conversation grounded
in reality



7 The only certainty
...is uncertainty, and there's no sign
it's going away



8 Opposition mounts
Does anyone like the
UP-NS tie-up?



Overcapacity and tariff turmoil driving rates down

Container spot rates flat across major trades

A slow restart following Chinese New Year kept container freight spot rates across the major trades flat as February ended and we trickled into March.

Truck flows in and out of China's box freight gateways remained traditionally subdued as they awaited a full reopening of the country's offices and factories, with European spots showing partial declines.

Drewry's World Container Index (WCI) recorded a one per cent week-on-week decline in its Shanghai-Rotterdam leg, which ended February at \$2,094 per 40 foot, with the index recording a two per cent drop on its Shanghai-Genoa leg, to finish at \$2,826 per 40 foot.

Drewry said: "Volumes typically rebound in March as factories across Asia reopen, but rates are expected to remain under pressure due to rising capacity. Hence, we expect spot rates on this trade to soften in the coming weeks."

However, while China's ports may be expecting surges in export cargoes over the course of March, there remain question marks as to whether it will be sufficient to address the now seven consecutive weeks of

spot rate declines on European trades.

One thing that may go in their favour is a slew of blankings over the first week of March, with Linerlytica reporting five on Asia-Mediterranean services and six Asia-North Europe sailings due to be blanked.

Voice of the Independent (VOTI) sources may remain circumspect on whether carriers' capacity management efforts this year will prove sufficient to prop up prices, but

the latest Shanghai Containerised Freight Index (SCFI) offers signs suggesting otherwise.

Often acting as a "forward curve" for the WCI, the SCFI aggregates quoted rates for the week ahead, and as such was recorded a four per cent increase on its Shanghai-North Europe leg, reporting a \$1,240 per teu rate.

Even better was the six per cent upturn it recorded on its Shanghai-Mediterranean base port route, which it put at \$2,305 per teu, with similar growth rates being predicted for its China-North America trades.

"Volumes typically rebound in March as factories across Asia reopen"

Continued on page 3

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Airfreight takes major hit from new conflict

AIRFREIGHT has taken a big hit from Israeli-US attacks against Iran, with some 3,000 flights cancelled in the first few days of the conflict and carriers announcing that they would be suspending services into all Gulf gateways for the foreseeable future.

With retaliatory action by Iran hitting airports in Dubai as well as critical infrastructure in neighbouring countries, Cathay Pacific confirmed that it would be suspending all services to both Dubai and Riyadh until 14 March.

At the time of writing, airspace over 10 countries – Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Qatar, Saudi Arabia, Syria, and the UAE – is at least partially closed, with sources struggling to find capacity.

Emirates SkyCargo, Etihad, and Qatar Airways Cargo also announced curtailments of services to affected airspace, and with Middle East carriers accounting for 13 per cent of global airfreight capacity, their grounding is constraining the wider network.

Together with Cathay Pacific, EU and US carriers announced they would be

suspending their services into the Middle East and Near East, leaving the region to all intents and purposes cut off from global markets.

With these carriers providing long-haul cargo connections linking Asia, Europe, Africa, and the Americas, the broader impact is being felt far and wide, with South Asia and South-east Asia two of the most exposed regions.

This is in no small part down to their heavy reliance on the Gulf to connect with Europe and beyond, meaning with these hubs out of action shipments are

the broader impact is being felt far and wide

facing up to being stranded, rerouted, or competing for the scarce capacity others have talked about.

Forwarding sources told Voice of the Independent (VOTI) that when it came to securing capacity, as soon as space was being advertised it was snapped up. Asked if it was harder than getting Glastonbury tickets, they said "yes".

Warnings were also being made on what this would do for costs, with both Asian and European carriers now having to contend with fuel-intensive rerouting as they looked to avoid closed



airspace.

Forwarders pointed out that they had severe cargo backlogs building as their shipments were rolled or awaiting allocation, all of which, they said, would lead to a significant surge in spot rates for services between Asia and Europe.

Further to which, it was also reported that forwarders are being required to collect their cargo deposited at EU gateways and reassign it to alternative carriers, pushing rates up on traditionally lower-yield Far East-Europe lanes.

Although there had been reports of some flights getting out of Dubai as this issue was going to press, the focus at the moment appears to be very much on getting non-nationals out of the region and back home.

As such, the short-term and medium-term prospects for cargo in the region appear bleak, particularly given that there had yet to be any indication as to when

airspace would be reopening and flights would get going again.

Resultantly, the warnings being issued across the sector is that any and all cargo originating from, destined for, or transiting through the Middle East should be considered subject to long delays.

As to the long-term, with each day of closure and uncertainty the backlog is only going to building meaning that even once the airspace does reopen, that backlog, together with the network imbalances brought about by the closures, are likely to take days, if not weeks, to unwind.

Warning that rates across the major trades could fall by as much as 30 per cent

continued from page 1

It recorded a four per cent upturn on its Shanghai-US west coast base port leg to \$1,857 per 40 foot, with its Shanghai-US east coast base port leg gaining seven per cent, to close at \$2,691 per 40 foot.

In contrast, the WCI recorded a one per cent downturn in rates on Shanghai-Los Angeles trades to close February at \$2,191 per 40 foot, while reporting no change on Shanghai-New York trades, at \$2,771 per 40 foot.

There is also a big unknown to consider on the transpacific trades, the introduction of general rate increases (GRIs) of \$2,000 to \$3,000 per 40 foot, with commentators asking if the carriers will stick to their guns on these or not.

Maritime Strategies International (MSI) analysts are warning that rates across the major trades could fall by as much as 30 per cent, due to excess capacity and the uncertainty stemming from the tariff situation following the US Supreme Court's February ruling.

"When viewed in aggregate, both Asia-North Europe and Asia-US west coast spot freight rates have fallen in the region of 15 per cent over the past month," MSI analysts wrote in a briefing.

"Most of this fall can be ascribed to seasonal trends around the lunar new year, although further rates declines are expected to be more heavily driven by overcapacity. Overall, we anticipate that rates will soften further in 2026."

They suggested that rates would stabilise in the region of \$1,000 per teu for Asia-North Europe trade and \$1,500 per 40 foot to the US west coast but noted that US-bound rates could see a potential upside if the new tariff situation leads to renewed frontloading.

UK regional airports getting a lift

REGIONAL UK airports are besting the big dogs, as cross-border ecommerce flows offer them something to crow about, while the main London gateways struggle to gain any momentum – even if they do continue to dominate in absolute terms.

Per Rotare, East Midlands and Glasgow Prestwick have recorded materially stronger growth, with the latter proving the stand-out performer in terms of rapid gains as it capitalised on congestion across other UK gateways.

Business development director at the Scottish airport Nico Le Roux said having landed volumes, as freighter operators sought alternatives due to handling restraints elsewhere, the airport managed to turn this into a structured end-to-end ecommerce operation.

This, Le Roux, added was aided by its dedicated facility and was also in no small part down to the support gained from the close coordination between platforms, master loaders, carriers, brokers and last-mile providers.

As such, over the nine months from May, it processed over 25 million parcels, more than 600 cargo flights, and in excess of 23,000 tonnes of imports, leading to multiple weekly widebody freighter services now connecting Prestwick directly to China.

Nonetheless, Le Roux expressed caution over any comparison being made with other

European gateways that have benefited from spiking ecommerce volumes, noting "I don't think we'll ever be as big as Liège".

Asked why, he pointed out that the Belgian gateway benefited from its central European location, which allowed it to serve multiple neighbouring markets. The UK's export base, he added, creates "a different dynamic".

Over in Birmingham, East Midlands is set to retain cargo as central to its future strategy when it begins a public consultation on its next 'Masterplan', setting out its growth projections through to 2041.

The gateway has benefited from Lufthansa Cargo's 2022 commencement of daily A321 freighter flights linking Frankfurt, Birmingham, and Dublin, with the service having since experienced steady gains.

Further to which, it has also welcomed a number of dedicated widebody ecommerce services, including daily B777Fs operated by Maersk Air Cargo, as well as multiple weekly B747Fs from Silk Way West.



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Focus ON

The AI training gap is th

GLOBAL logistics is contending with a skills shortage unlike any it has dealt with before. The shortages, chief executive of LS Global Group Bryan Vreeland tells Voice of the Independent (VOTI), are "right now layered, and they're not uniform across the globe". Fractured though the situation may be the industry need not turn totally regress into a state of despair. As Vreeland points out, yes, the fracturing may "actually be part of the problem", but it also presents opportunities.

"At the surface level, every region is feeling the pain of an aging workforce and a pipeline that isn't replenishing fast enough," he continues. "Seventy-six per cent of supply chain leaders across North America and Europe are reporting significant workforce shortages, and only about thirteen per cent of the logistics workforce globally is under twenty-five. That is an existential issue for an industry that moves the world's goods. But when you dig into the specifics, the shortages look very different depending on where you are."

Breaking the issues down regionally, the acute gaps in the North American markets are focused around mid-level operations talent. This means that companies are struggling to find those who can manage transport management systems (TMS), run data-driven forecasting, while still having a grip on the way freight physically moves. A key part of the problem for the region is that in the US alone there are more than eight million unfilled jobs across a range of industries. Logistics is not alone contending with the problem, which means it is having to compete for digitally literate talent with

finance, healthcare, and tech employers, to name but a few. European markets are equally affected by a lack of skill in similar areas but compounding the problem is a combination of bureaucracy and an aging population.

Strict immigration frameworks, that are limiting how quickly companies are able to bring in skilled labour from outside the EU, have proved particularly onerous for the logistics operators looking to address the demands of the modern supply chain. Vreeland notes that operators in Austria and Germany are among those hardest hit but bureaucratic barriers, and non-wage labour costs, "making them less attractive than neighbouring markets".

Over in Asia-Pacific, the dynamic is markedly different with the region beset by a growing, skilled workforce.

Albeit a workforce that's quality is yet to be matched by available infrastructure. Together with the training ecosystem, Vreeland notes that the infrastructure as struggled to keep up with the pace of e-commerce expansion. This means that while there is a skilled workforce, the training pathways available to ensure that they match up with what the industry is calling out for is not actually there.

Across the regions, Vreeland says that the universal shortage, "the one that cuts across every geography", is digital fluency.

"About sixty per cent of logistics roles are being reshaped by AI and automation, but only twenty-eight per cent of workers have access to any kind of training that matches those changes," he continues. "That gap is the real crisis. We're asking people to operate in a technology-driven environment with a workforce that was trained for a paper-driven one. How do you address it? You stop

treating training as a cost centre and start treating it as infrastructure. You build structured upskilling programmes that meet people where they are. You invest in global talent pipelines that leverage regions with capable, trainable workforces and connect them to markets that need the capacity. That's a model we operate every day at LS Global Group, deploying trained professionals from high-capability talent markets into logistics operations that can't fill roles domestically. And you have to accept that this isn't a twelve-month fix. The structural rebalancing of this workforce is a five- to ten-year project, and companies that start now will have a meaningful competitive advantage over those that keep treating this

as a temporary hiring cycle."

Founder of Culturelink, a consultancy specialising in multicultural team culture and cross-cultural leadership, Tania Pellegrini tells VOTI that part of the problem when it comes to meeting training and recruitment demands is that this is not the only issue that logistics operators are

contending with.

"The global logistics and freight sector is facing a convergence of challenges: structural skills shortages, rapid digital transformation, and shifting workforce expectations," Pellegrini says. "Demand for freight movement remains strong, yet many organisations are struggling to recruit and retain the talent required to manage increasingly complex supply chains."

And if digital fluency is the most universal of the shortage, Pellegrini notes that one of the most visible is in a key operational role, namely, haulage. This is captured by the International Road Transport Union (IRU) perpetually calling out the need for drivers. Per the UN agency there are some 3.6 million unfilled truck driver

positions across 36 different countries – again, Europe and North America are particularly hard hit on this one. Head of skills policy at Logistics UK Bethany Windsor tells VOTI driver shortages have been well documented for some time.

"Over half of HGV drivers are aged over 50, and the average driver age remains high at 48 years old," Windsor says. "While some young drivers (16-24) are entering the workforce – 2,813 joined between the first quarter of 2024 and the first quarter of 2025 – retirements outstrip new entrants. This pressure has been made worse as the government's HGV Skills Bootcamps, a key initiative launched in 2022 to train new drivers quickly through free, flexible 16-week courses, have lost central funding. The programme trained more than 20,000 drivers and achieved a 72 per cent job placement rate, successfully attracting career changers and unemployed people. Responsibility has been shifted to devolved authorities, although only a few regions have funding in place for replacement schemes at present."

Addressing driver shortages will require some creativity on the part of the haulage sector. Not least is the problem that, particularly in Europe and North America where these shortages are most acutely felt, there has been a significant shift in both priorities and what people are willing to accept as far as work-life balance goes. One UK-based small haulage operator tells VOTI that they have struggled to recruit drivers to handle their cross-border work.

"Younger applicants simply are not prepared to spend days away from friends and family," the haulage operator continues. "What they want is a more structured lifestyle with a clearer split between work and life. The days of drivers sleeping in cabs for nights on end may be nearing its end. To resolve this, what is needed is a restructuring of the sector. For instance, drivers replacing one another for

different legs of the journey, as opposed to one driver running the whole leg from, say, the UK to Italy."

Pellegrini notes that while driver shortages may "highlight a long-term structural challenge for the sector", the deeper challenge for the logistics industry as a whole lies in the evolving nature of the skills required to run modern logistics networks.

"Alongside technical and digital capability, another gap becoming increasingly visible across international logistics networks is communication capability," she says.

Pellegrini partners with international organisations to transform cultural diversity into a strategic advantage rather than a source of friction. As such, she points out that freight operations depend on coordination across cultures, time zones, and organisational boundaries.

"When communication breaks down – whether due to hierarchy differences, decision-making styles, or unclear expectations – delays, friction, and inefficiencies follow," she continues. "As logistics becomes more global and digitally connected, the ability to communicate clearly across cultures is increasingly becoming a core operational skill rather than a soft one."

Trade lane developer at KPM Logistics, Lucas Garcia, recognises the growing gap on the communications front.

"Today, the logistics sector is not only lacking technical expertise but also human skills clear communication, big-picture thinking, and the

ability to stay calm and solve problems under pressure," Garcia tells VOTI. "While this challenge is global, it looks different in each region: developed countries are coping with aging workforces and fewer young professionals entering the field, while emerging markets struggle with training gaps and high turnover. Solving this will require ongoing investment in people through



LUCAS GARCIA
KPM Logistics

continuous learning, better working conditions, and making logistics a more attractive long-term career."

And that last point has been an issue the sector has been fervently looking address for the better part of a decade now. Sources have repeatedly told VOTI over the years that logistics, and freight forwarding, had been predominated by aging men. Nonetheless, there are very clear signs this may be shifting. The number of young recruits entering the forwarding sector has been increasing year on year. The efforts made by the likes of the WCA and British Independent Freight Association (BIFA) to promote employment of new recruits has been apparent. Nonetheless, it cannot go unsaid that amid skills shortages and the need to improve the training pipeline, most forwarders are caught between two realities. A situation, Vreeland says, that has left them struggling to honestly reconcile.

"On one side, they are deploying AI faster than at any point in the industry's history," he notes. "For instance, one of the multinational forwarders has thirty-plus generative AI agents automating millions of tasks across their freight lifecycle, while another is running networks of AI agents for end-to-end shipment execution, and even mid-market forwarders are implementing tools that handle quoting, document processing, and carrier matching without human intervention. On the other side, they are trying to recruit a new generation of workers and tell them with a straight face that their careers are secure. Those two narratives are colliding, and most companies are not handling the messaging well."

Against such a backdrop,

"Seventy-six per cent of supply chain leaders across North America and Europe are reporting significant workforce shortages"

"Solving this will require ongoing investment in people"



BRYAN VREELAND
LS Global Group

Training and Recruitment The real crisis

the biggest AI challenge for forwarders right now is not the technology itself. As Vreeland notes, a recent survey of over a hundred forwarders found that forty-eight per cent said their top concern was a lack of internal expertise or understanding of AI, not the AI displacing their people.

"The fear of redundancy is real among workers,



BETHANY WINDSOR
Logistics UK

absolutely, but the bigger operational reality is that most companies can't even get AI implemented properly because they don't have the people who understand how to work with it," he continues. "Here is what I tell our clients and what I would tell any logistics company wrestling with this: stop framing AI as a replacement conversation and start framing it as an elevation conversation. The companies that are winning right now, the ones actually attracting young talent, are the ones that position AI as the thing that eliminates the drudgery so that people can do more meaningful, higher-value work. When you automate rate lookups, appointment scheduling, and document classification, you're not eliminating the freight coordinator's job. You are eliminating the worst

parts of it and giving that person the bandwidth to manage exceptions, build client relationships, and make strategic decisions. That is a career pitch that resonates with a twenty-five-year-old who wants to grow, not just clock in."

A trend spotted across those companies failing to recruit is a tendency at sending mixed signals. As those VOTI spoke with note, you will have a forwarder in one breath talking about investing in people on their careers page while announcing headcount reductions tied to AI rollouts in their earnings calls.

"The workforce sees through that immediately," Vreeland says. "At LS Global Group, we sit on both sides of this equation. We provide

the people, and we build the AI solutions. So, we have had to reconcile this tension in our own business model, and the answer we've landed on is that AI creates more demand for human judgment, not less, but it demands a different kind of human judgment. The recruits you're trying to

attract do not want to be data entry clerks. They want to be problem solvers who happen to use powerful tools. Give them that, and the recruitment challenge starts to solve itself."

Windsor echoes Vreeland. She says that not only is technology an enabler, rather than a replacement, but it is already widely used and helping improve efficiency by automating many repetitive and time-consuming tasks.

"a key priority is ensuring that conversations around AI are transparent and grounded in reality"



To address the concerns of those entering the sector, Windsor points out that many of today's jobs did not exist a few years ago, adding that AI presents a great opportunity for upskilling as the technology becomes more critical for logistics operators.

"For forwarders and logistics companies, a key priority is ensuring that conversations around AI are transparent and grounded in reality," she continues. "Businesses are increasingly emphasising that AI supports, rather than substitutes, professional judgement, operational expertise and customer relationships. Human oversight, accountability and sector knowledge remain central, even as digital tools become more sophisticated. Recent industry discussions

have reinforced that responsible implementation, governance and trust must sit alongside innovation if AI is to deliver long-term value. It is an exciting time for logistics careers. Over the coming years, the workforce will need to adapt to a range of emerging technologies and practices, but that adaptation is already underway. Automation and robotics in warehousing and distribution are becoming increasingly common, alongside greater use of AI-enabled planning, forecasting and route-optimisation tools. These systems are enhancing decision-making and freeing up skilled professionals to focus on higher-value activities.

"AI should, therefore, be viewed not as a threat to **continued on page 6**





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Focus ON

Training and Recruitment

Working alongside emerging technologies

continued from page 5

logistics careers, but as part of a broader transformation that is making the sector more innovative, data-driven and sustainable. The focus for operators is on equipping their workforce to work alongside emerging technologies, ensuring that human expertise remains at the heart of a more automated and digitally connected supply chain environment."

From Garcia's perspective, forwarders are paying attention to the need to properly frame the relationship between AI and prospective employees.

"Companies are increasingly positioning AI as a partner to people, not a replacement for them," he says. "By investing in reskilling, hybrid roles, and human strengths such as negotiation, empathy, and sound decision-making they help reduce uncertainty and build confidence among employees. To attract new talent, it is essential to show that logistics remains a strategic and dynamic field, offering meaningful work, stability, and real long-term career opportunities."

It is not all on forwarders to address these training and recruitment needs. As Garcia says, governments, technology companies, and industry associations need to work together with a clear

focus on people. This, he says, means investing in practical technical and digital education, continuous learning opportunities, and certifications that truly help professionals grow throughout their careers. Further to which, there is a general belief that it is also essential to improve the public perception of the sector and introduce technologies that make daily work easier and more meaningful, rather than more stressful. Ultimately, Garcia says, the future of logistics will depend on finding the right balance between innovation and

"The talent exists globally; it's just not distributed where the demand is"

human capabilities, ensuring that professionals can build stable, fulfilling careers even as the industry continues to evolve. Vreeland concurs that government must liaise with other stakeholders but warns that for it to be successful there must be proper coordination between the parties.

"And right now, nobody is coordinating," he adds. "Governments are writing policy frameworks that do not reflect the speed at which the industry is changing, tech firms are building tools without thinking about who is going to use them, trade associations are hosting panels about the future of work instead of funding the

training programmes that would actually prepare people for it, and logistics companies are waiting for someone else to solve the problem while their attrition rates climb."

So, how can they do this. Vreeland suggest that governments must do two things "immediately". First of which, he calls for the modernisation of immigration and work visa frameworks to allow the cross-border movement of skilled logistics professionals.

"The talent exists globally; it's just not distributed where the demand is. Countries that make it easier to move trained operations professionals across borders will have healthier supply chains," he says.

Together with the modernising of visa frameworks, Vreeland also believes that there is a need to fund industry-specific digital training programmes at both the vocational and the community college level. This, he says, means logistics technology training that teaches people how to operate warehouse management systems, work with AI-powered freight platforms, and manage digitally integrated supply chains.

"Tech firms, and I say this as someone who runs an AI automation company, need to build products that are designed for adoption, not just for capability," he continues. "The most powerful AI tool in the world is useless if the people who need to use it cannot

understand it or do not trust it. That means investing in user experience, in onboarding, in change management support as part

of the product offering. It also means being honest about what AI can and can't do. Every time a tech company overhypes AI's

ability to replace human decision-making, it makes the recruitment challenge worse for the entire industry."

WCA Academy on course for a thriving and busy year

2026 is proving to be yet another busy year for the WCAworld Academy. Over the coming months, a host of new training courses are set to be unveiled by the academy as it looks to continue growing the expertise of not only the membership, but of those who work for the association itself.

WCAworld Academy manager Leah McKenna (below) tells Voice of the Independent (VOTI) that the work she and the team are undertaking is as much driven by demand from members as it is internally.

"This year we have a lot of new courses coming online," says McKenna. "Perhaps the most exciting of these is our new 'introduction to e-commerce logistics' course. Added to which, we are bringing in additional sustainability courses, which means by the end of the year we will have between five and six courses focused on sustainability."

For McKenna, WCAworld Academy's dedication to courses around sustainability are there as an enticement to the membership. Recognising that for certain countries, the idea of sustainability comes second, she says it is sometimes hard to get people on board.

"A lot of the time, sustainability only excites those that have to be interested in it," McKenna continues.

"But that does not mean we should not offer them. We run these classes because it is important to have them. Yes, you see that where



there is no external pressure around sustainable practices, such practices can be seen as an unnecessary expense. But you also see members wanting to get on board not because they have to but because they believe it important to do so. We offer the courses as it is something we need to promote and to help them become more environmentally friendly as they move cargo."

McKenna is also keen to let the membership know that the WCA does not rest on its laurels, with the association's employees also undertaking a host of new training opportunities over the course of the year.

"We are promoting training for our own employees too," says McKenna. "We are doing this as it is important for us as a global association. We need to be constantly developing our skills as much as the members. This year, we have been rolling out our cultural training programmes to help our employees understand how to relate to members and colleagues from a divergent range of cultures."

And, with the WCAworld Conference hurtling into view, McKenna was also keen to note a course developed especially for new members and those attending the conference for their first time. Providing advice on what to expect, how to handle one-on-ones and how to manage time, the 'Networking and Thriving at the WCA World Conference' course had proved a big hit in advance, with a large sign-up.

"During the conference we will be running three training sessions for 100 members," McKenna says. "Two of these will be the Networking and Thriving programme while the third will be our GDP training session. We do the latter every year, and last year went really well. We received really good feedback."

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Spotlight ON

Godfried Smit



secretary general
European Shippers Council

The certainty that uncertainty will prevail

IF there is one thing traders crave in this world it is certainty. Crave it or not, since Donald Trump's return to the White House last year, such cravings have gone unsatiated. And there appears little indication that the situation is likely to improve any time soon. That desire for certainty is a refrain echoed by secretary general of the European Shippers Council (ESC) Godfried Smit sitting down to speak to Voice of the Independent (VOTI).

"The main problem for shippers is always uncertainty – and today, uncertainty is abundant. Where yesterday duties were the main concern, today we are once again facing a war that is disrupting critical supply chains," Smit tells VOTI.

Speaking just days after the US and Israeli strikes on Iran, the cause for concern is by no means overinflated. At the time of writing, some 10 per cent of the global containership fleet is caught in the waters around the Gulf, with suggestions that they may struggle to secure the insurance necessary to continue their journeys. Even if they did, there was no telling whether or not

they may become targets of Iranian retaliation. All of which only adds to the uncertainty Smit worries is upending the global trading order.

"This situation creates serious challenges for international trade," he continues. "What companies need is predictability to secure supply and sourcing, calculate margins, and determine cost prices. Certainty is essential for the proper functioning of global trade."

The decision of the US Supreme Court to kibosh the Trump administration's signature economic policy, namely, his wide-reaching tariff regime, offered a glimmer of hope. In the hours following the decision, some felt that maybe the decision was sufficient to leave the so-called "Liberation Day" tariffs as a blip, a moment in history that would be swiftly forgotten as the old rules of trade kicked back in.

Such hope appears misguided now. Rather than accept the ruling, it appears the Trump administration is looking for another way to ram through tariffs. And as for the hopes of a swift processing of refunds for

those importers and shippers who had already paid, it seems that they may be waiting a while too.

"The recent verdict on duties in the United States still leaves considerable uncertainty. It remains unclear whether duties that have already been paid can be recovered, and legal procedures are likely to take months," Smit comments.

Nonetheless, Smit also points to pockets of optimism in Europe, not least a series of free-trade deals that had been struck by the EU in the opening days of 2026, including with India and the Southern Common Market, better known as Mercosur, comprising Argentina, Bolivia, Brazil, Paraguay, and Uruguay.

"These are positive developments – the Mercosur agreement and the India agreement, and other trade agreements currently under negotiation," Smit says. "These agreements are vital for diversifying sourcing and strengthening supply chain resilience."

Although, he has been less effusive in the work undertaken by European Commission regulators when it comes to Chinese electric vehicles (EVs). The bloc

appears to have inched closer to a resolution that would allow for a greater number of Chinese EVs to be sold in Europe following the publication of new EC guidance. The guidance is intended to address the concerns of European EV manufacturers who fear being able to compete with their Chinese competitors on pricing. As such, the guidance requires Chinese EV manufacturers to both limit the number of vehicles they export and to operate under a minimum pricing threshold. Should they agree to this, Europe would agree to remove the 35 per cent tariff rate it slaps on Chinese vehicles. While some have praised the decision, Smit is more circumspect, with warnings that the guidance could complicate the situation for importers.

"The commission's guidance on price undertakings allows certain Chinese EV exporters to replace countervailing duties with a minimum import price (MIP) commitment," Smit says. "For importers of record, this does not remove risk – it shifts risk from tariffs to compliance with pricing controls. The core change is that instead of

paying a duty, every shipment must demonstrably respect a minimum effective net price."

Under such an arrangement, Smit says the problem is that any mechanism designed to reduce the price, be it through dealer bonuses, financing incentives, marketing support, or post-sale credit notes, alongside rebates had the capacity to trigger non-compliance, creating issues for importers. To ensure they were not caught out with this, importers would be forced into implementing a single, effective, net price calculation per shipment. That means one that included all price adjustments and blocked credit notes, rebates, and any retroactive discounting. Further to which, they would also need to limit what incentives dealers could apply.

"They need to reconcile commercial pricing and customs value regularly to avoid declaration inconsistencies, maintain standard audit-ready documents, and include contractual protections with OEMs including data access, representations, indemnities," he says. "Where this fails, they need a snapback plan for repricing and inventory. MIPs may lower headline duties, but increase importers' operational, contractual and audit exposure. Success

depends on treating pricing compliance as regulated process, not a commercial afterthought."

So where else does Smit hold concerns? One thing he points out that has predominated European discussion of late has been "military mobility". While he does not offer too much on the military side of the discussion, beyond stressing that it is "frequently" at the fore of talking points, he urges those involved in these discussions to consider the wider implications of "readiness".

"We hope that these discussions will also take into account the need to safeguard the supply of food and other essential goods required for the EU population," Smit says.

Concerns around preparedness came to the fore last year, after a report urged EU households to stockpile enough food for 72 hours – be it in case of war, pandemic, or natural disaster. But forwarders VOTI has spoken with believe there is more governments could be doing when it comes to European food preparedness. And Smit agrees.

"At present, this aspect is not sufficiently considered," he concludes.



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UP-NS rail merger may yet hit the buffers as opposition mounts

UNION Pacific's looming rail tie-up with Norfolk Southern has faced sharp rebuke from exporters, port operators, and the pair's rivals who are warning that the deal will reduce competition in the sector and spike shipping costs ever higher.

Pushing back against claims from Union



Pacific that the multi-billion dollar merger would lead to a faster, seamless coast-to-coast network, president of the National Association of Waterfront Employers Carl Bentzel said the combined entity would wield too much power.

Pointing to the heavy investments ports had made in rail connections to expand their inland reach and compete for cargo, Bentzel said this could be undone by a combined railroad with the capacity to prioritise certain gateways or corridors over others.

"More competitors is better to develop these markets," he said, noting that the reduction in competition could also limit future expansion of inland rail services linked to ports while others have warned that it could hobble routing options down the line.

BNSF group VP of consumer products John

Gabriel is among those claiming the merger would "dramatically" reduce routing options, noting "today every customer effectively has four transcontinental options", but "overnight ,that gets cut to two".

As he suggested that the improvements Union Pacific claimed a merger could bring the sector were achievable through collaboration between the railroads without need for consolidation, "there's nothing magical about the merger that creates that," Gabriel added.

Executive director of the Soy Transportation Coalition Mike Steenhoek also beat the drum of opposition to the deal, pointing out that having multiple rail options, particularly during supply chain disruptions, was important for customers.

Steenhoek said that freight "does not like

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to be treated like a baton in a relay race", adding that "in a volatile global market, redundancy and resilience are critical", but reduction in the number of competing routes threatened increased risk to supply chains.

Another worry for shippers is the fear that if the merger proceeds, railroads could prioritise the most profitable corridors, while port and terminal operators have voiced concerns about the potential impact on infrastructure investment.

The present state of play with the deal, which has received support from President Trump, is that it will undergo a detailed review by the Surface Transportation Board to determine whether the merger enhances competition – the key test under modern US rail merger rules.

That political support had initially prompted many to assume the path to approval had been smoothed, but with pushback from a host of directions, including Republican Congress members, the sense is that the outcome is not a foregone conclusion.

"There's a long race ahead on this merger," Bentzel said, as the US logistics sector contends with the issue of whether consolidation will unlock rail's long-promised intermodal growth; or concentrate market power in fewer hands.

Global ocean fleet reduced by 10 per cent by Gulf war

CHARTER and rental rates for vessels and container equipment are set to surge following the Israel-US attack on Iran that has left some 650,000 teu of global container shipping capacity out of action.

Shipping consultancy Linerlytica said that while only accounting for 3.3 per cent of total global throughput, the disruption arising from the closure of the Strait of Hormuz and the conflict could affect up to 10 per cent of the global fleet.

It noted that with 458,000 teu, or 1.4 per cent of the global fleet trapped in the Persian Gulf, "increased port congestion, tightening vessel supply, and container equipment shortages would push up both freight rates and charter rates in the short term".

But with 3.4 million teu passing through the strait, Linerlytica warned: "A prolonged closure would lead to a reconfiguration of these services and result in a short-term tightening in vessel supply and equipment, and increased congestion at Asian ports."

Of the main liners with capacity trapped in the region, MSC appears the most affected, with Linerlytica reporting that some 100,000 teu in the region, while CMA CGM has some 80,000 teu affected.

Hapag-Lloyd's chief executive, Rolf Habben Jansen, told those attending TPM conference in Long Beach that the German carrier had "several" vessels unable to leave the Persian Gulf amid the escalation of Middle East hostilities.

Pressed on details, he refused to specify the number of vessels but said that cargo volumes in the mid-double-digit thousands of teu were exposed.

"Everyone has ships stuck in the Persian Gulf... currently our first priority is to ensure that our crews and ships remain safe. They cannot go out at the moment, and the situation still remains very fluid," he said.

"What we're doing right now is to assess where we have space to potentially store some of that cargo, because we don't want all of that to be stuck on the ships." But he rejected any assertion that the disruption could help carriers.

The uncertainty that has been thrown up by the conflict has energised interest in freight futures for the Asia-North Europe route, which began the month being heavily traded on the Shanghai International Energy Exchange.

With the conflict being expanded to Lebanon by the Israel-US coalition, forward prices surged to their 15 per cent daily upper limit and volumes rising above 100,000 lots – the first time this has happened for six months.

Indicating the boom being reported, July contract prices were up by more than \$200 from where they sat in mid-February, hitting \$2,094 per 40ft, with traders expecting a freight rate surge in line with the usual peak period for long-haul shipments.

Voice of the Independent

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