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Data indicating that carriers have drastically cut their Asia Pacific-Europe freighter capacity

EUROPEAN efforts to reduce the flow of cheap, Chinese ecommerce into the bloc seem to have paid off, with data indicating that carriers have drastically cut their Asia Pacific-Europe freighter capacity.

Per Rotante, dedicated Europe-bound freighter capacity out of Asia Pacific was down 15 per cent for the week ending 23 August, compared with the seven days ending 28 June, the final full week before the European ecommerce regulation came into effect, on 1 July.

Forwarders told Voice of the Independent they expected the rules to be felt "early doors", although some said they had caught them a little by surprise, especially with global freighter

capacity falling just two per cent over the same period.

Digging into the Rotante data, it seems that some of that reduction in freighter capacity had been set in place before the rule change, with some of the biggest beneficiaries of the Covid-induced boom in Chinese ecommerce losing flights.

For instance, between late June and late August, Hong Kong-Budapest lost around 1,100 tonnes of weekly freighter capacity, a decline of

76 per cent, while Shanghai-Amsterdam declined by around 660 tonnes, or 30 per cent.

Although there are indications that a floor may have been found, with Europe-bound volumes from a combined mainland China and Hong Kong having moved up one per cent week on week, marking its first week on week increase since the start of June.

WorldACD said that the "increase could signal a bottoming-out of the downward trend and stabilisation"

trend and stabilisation" of volumes at a new, lower level, supported by rebounding post-summer demand.

Further evidence for this is evident in the shape of China-Europe spot rates, which have rebounded following a late-July low, which came after falling for six consecutive weeks between week 25 and week 31, dropping from \$5.43 per kilogram to \$3.79.

Since, they have risen to \$4.14 per kilogram, with rises over three consecutive weeks, to leave them 13 per cent up on a year earlier – although some suggested this may have been helped by pockets of ocean freight congestion.

Continued on page 3

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Freighter services give Zambian air cargo market a boost

ZAMBIA seems to be shaking off claims its market is too small, with Emirates SkyCargo and TAAG Angola Airlines launching dedicated freighter services within weeks of each other, making it one of Africa's hottest new air cargo battlegrounds.

Industry insiders were surprised by the decision of the two carriers to begin servicing the southern African hub with weekly B777 and B737-800 freighter flights respectively, one source recently noting "insufficient demand" between Angola and Zambia.

Launched as part of TAAG's north-south logistics corridor, opening a new gateway for cargo from Europe, China and Brazil

while strengthening distribution links across Africa, the first service carried 12.8 tonnes of machine parts, IT equipment and other high-value cargo from Amsterdam to Lusaka.

The Angolan carrier expects subsequent services to carry even heavier loads as it looks to up its own commercial links with Zambia amid a blossoming period for sub-Saharan Africa's economies.

Meanwhile, Emirates said it made the move on the basis that demand had simply outgrown the cargo space available on passenger aircraft, pointing to rising imports of pharmaceuticals, electronics, medical supplies, industrial machinery and express parcels.

The Dubai-based carrier said growing trade with China, India, Turkey and the UAE had driven this, with executive Khalid Mohd Al Hinai noting, "Lusaka's landlocked geography makes air freight particularly valuable for urgent, time-sensitive and high-value cargo".

For forwarders, the arrival of a B777 freighter could provide a direct alternative to routing cargo through traditional African hubs, such as Nairobi, Johannesburg and Addis Ababa, although both carriers believe Zambia offers potential as a regional hub.

For Emirates, the thinking is that Lusaka could become a regional distribution hub, serving neighbouring Zimbabwe, Malawi and parts of Botswana; with TAAG also looking at strengthening ties with southern Africa as well as Brazil, China, and Europe.

The optimism reflects some of the talking points Voice of the Independent (VOTI) has had with forwarders over the past 18 months, with many seeing links between the sub-Saharan states and Brazil as

presenting obvious growth opportunities.

"The cultural links to Brazil – both were once Portuguese colonies – are strong, and you are seeing the levels of tourism between the two creating relationships that are, in turn, bolstering trade," one forwarder told VOTI.

"The craziness in Washington with the tariffs, and especially its hostility towards Brazil, is only driving the country towards new trading partners as it looks to wean itself of its dependence on this big economies [like the US and China]."

Long-term, the forwarder did not want to take a punt on whether the development of these new tradelanes would support the influx of additional airfreight capacity, but they did say that the conditions were there for things to flourish.

Establishment of a new balance following the EU rule change

continued from page 1

One commentator noted that rates may also be being helped by that combination of reduced freighter capacity and indications that demand is stabilising, all of which are leading to the establishment of a new balance following the EU rule change.

While that may be the case for China-Europe, it seems the same cannot be said for Hong Kong-Europe rates, which are just five per cent up on where they were a year earlier at \$4.91 per kilogram.

And it seems those hoping for a rate reduction will not be helped out by a wave of new aircraft hitting the market, with Trade & Transport Group painting a picture of structural constraint and a slowdown in new aircraft deliveries.

It estimates that the global large-widebody freighter fleet can grow by only around two per cent annually over the next five years, from about 717 aircraft at the end of last year to just under 800 by the start of the next decade.

The question everyone will be looking for answers to is whether carriers have over- or under-estimated the amount of capacity they needed to cut to match demand levels in a post de minimis Europe, particularly considering the pockets of growth emerging.

For instance, while those gateways that had benefited from the ecommerce boom may have experienced an expected volume drop, Hong Kong-Frankfurt numbers, for example, are looking markedly healthy, gaining 503 tonnes weekly since that final week of June.

Taking this and the first weekly increase in China/Hong Kong-Europe traffic since early June into consideration, one commentator told VOTI the questions over too little or too much being cut will only grow if that develops into a more sustained recovery.



Cosco in multi-billion newbuild spending spree

CHINA'S Cosco Shipping is on course to become one of the world's top three container lines by size, overtaking Maersk, after placing another multibillion-dollar shipbuilding spree, with 18 new vessels set to arrive before the end of the decade.

The Chinese shipping giant's latest order is for a dozen 22,000 teu LNG dual-fuel mega-ships from Shanghai Waigaoqiao Shipbuilding, and six 3,200 teu vessels from CSSC Huangpu Wenchong Shipbuilding.

The orders carry a price tag of some \$224 million each for the larger vessels and \$50 million apiece for the smaller ones, all are due for delivery between 2028 and 2030 and follow on the heels of a \$2.22 billion order for newbuilds in April.

That deal was for 12 LNG dual-fuel 13,600 teu ships to be part of its joint operation with sister line OOCL, which itself put in a \$2.4 billion order for 12 LNG-fuelled 18,000 teu vessels in January.

According to Linerlytica, these buying sprees have catapulted Cosco's orderbook to 1.89 million teu, making it the biggest in the industry, after MSC.

Assuming every vessel is delivered as planned, Cosco's owned fleet would not be too far off doubling its present 2.78 million teu capacity, surpassing the 4.47 million teu that Linerlytica said would be enough to leapfrog Maersk as the third-largest carrier.

Maersk could follow suit and slap down a major order of its own – its present

orderbook is 867,466 teu, while its fleet is a little over three million teu – but neither Cosco nor Maersk look like displacing the top two carriers in size.

CMA CGM owns 3.22 million teu, and its orderbook is likely to put it at 4.91 million teu, once all its new ships enter service, cementing second place behind MSC, which has 5.39 million teu in service and three million on order.

Per Linerlytica, Cosco's latest order has pushed the global containership orderbook to a record 14.84 million teu, equivalent to 43.1 per cent of the world's container fleet, underlining the extraordinary scale of the industry's race to build more ships.

However, what this means for rates remains to be seen, with the present rate situation kept artificially high as a consequence of the situation in the Red Sea and the redirection of ships around the Cape of Good Hope.



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Focus ON

Humanitarian aid: attention to deta

"UNFORTUNATELY, humanitarian crises are becoming more frequent, more complex and often more difficult to predict," president and chief executive of Genel Transport, Turgut Erkeskin tells Voice of the Independent (VOTI). The UN estimates that some 240 million people across 50 countries have needed humanitarian assistance this year. Some of this stems from long-term crises, some from a series of catastrophic events that have rocked the world over the past 12 months.

Sadly, at the time of writing, Nepal is grappling with the consequences of one such catastrophic effect, after the country was rocked by a series of flash floods along its border with China. Thousands have already been confirmed dead, several thousand more are displaced or injured. Multiple sources VOTI has spoken with in recent weeks said that addressing these rapidly evolving crises is always helped by having teams on the ground, and if not "having partners who can help get the right responses in place".

"When a disaster occurs, it is too late to start establishing relationships, understanding border procedures or identifying reliable partners," Erkeskin says. "These capabilities and relationships need to exist beforehand. A very clear example for us was the response to the devastating earthquakes in Türkiye in February 2023. In the



TURGUT ERKESKIN
Genel Transport

immediate aftermath, the challenge was not simply finding transportation capacity; it was understanding which routes were still operational, where cargo could be received, how it could be transferred onward and how urgently needed supplies could reach the affected areas without creating further bottlenecks. The situation reinforced for us the importance of rapid decision-making, close coordination with all stakeholders and having trusted partners and operational teams already in place before a crisis occurs."

Founder of CharterSync, Ed Gillett notes that one of the questions that many think to ask when operating into disaster zones is

"Every situation throws up a different set of these questions; the job is to answer them fast"

whether an aircraft can land. Acknowledging that this is an important question to ask, he says that just as important is whether the cargo being carried can be offloaded and is there the right equipment in place to ensure the goods get to where they need to. Nepal, he says, exemplifies what needs to be done to ensure operations are pulled off seamlessly.

"Flying into Kathmandu means pilots have to complete dedicated simulator training modelled on the complex Himalayan terrain around the airport," Gillett tells VOTI. "Chartering an aircraft that would not normally fly there means reacting quickly to find out whether the operator can get its pilots into the simulator at short notice. Every situation throws up a different set of these questions; the job is to answer them fast."

It is a lesson Erkeskin has also picked up on, noting that the last mile is often more challenging than the international movement itself. Indeed, he says that flying or shipping humanitarian cargo into a country can sometimes be the relatively straightforward part. It is getting it from the airport, port or border to the people who actually need it,

"particularly where infrastructure has been damaged or security conditions are difficult", that has frequently proved to be the greater challenge.

Nepal may be the most recent, but it is also one of many events to have strained those involved in the humanitarian logistics sector. Director of government and humanitarian services at Air Charter Service (ACS) Ben Dinsdale tells VOTI that despite being "very well set up to respond to humanitarian disasters" ACS has faced a "variety of challenges" that have necessitated a range of responses.

"In Venezuela recently, aside from the sanction considerations, the biggest question was which airports would be open," Dinsdale says. "At the outset it looked like Caracas Airport would be unusable, so everyone was focused on alternatives like nearby Valencia and even El Libertador military base not far away. It was quickly established that Caracas was usable and the majority of aircraft landed there. It's all about providing suitable alternatives."

And then there is the conflict in the Middle East and the associated airspace closures that has necessitated coordination between teams across the region. Dinsdale says that having constant contact with those on the ground can prove pivotal, noting that once "openings happen, we are ready to fly immediately". Erkeskin sees in this one of the most important lessons for humanitarian logistics. Namely, that "preparedness is everything". He says that when a disaster occurs, it is too late to start establishing relationships, understanding border procedures or identifying reliable partners. These capabilities and relationships need to exist beforehand.

"A very clear example for us was the response to the devastating earthquakes in Türkiye in February 2023," Erkeskin says. "In the immediate aftermath, the challenge was not simply finding transportation capacity; it was understanding which routes were still operational, where cargo could be received, how it could be transferred

onward and how urgently needed supplies could reach the affected areas without creating further bottlenecks. The situation reinforced for us the importance of rapid decision-making, close coordination with all stakeholders and having trusted partners and operational teams already in place before a crisis occurs."

Dinsdale concurs. He says that what you need to be doing is putting the work in to be ahead of any situation by anticipating where the pinch points will be. At ACS, this has meant pouring in what he describes as a "vast number of man hours" into establishing what the situation is on the ground, who they can speak with locally to land and offload aircraft safely as close to where they are needed as possible, and, again, stressing the need of having someone in place.

"This is always better achieved if we have an ACS team on the ground," Dinsdale adds. "Over the years our staff have been in the Maldives, Indonesia, Pakistan, Haiti, Baghdad, Afghanistan, Nepal, South Sudan, Chad, Philippines, Jamaica, and most recently, Venezuela. Not only does their presence help us with our immediate operations but provides our teams in the office first-hand experience – which is impossible to replicate elsewhere and makes them better able to do their jobs in the future."

For Gillett, what needs to be understood when dealing with humanitarian crises is a recognition of how "little it takes to undo a flight". He says that even one which looks straightforward can be knocked off course by a single variable.

"It is the Swiss cheese model in practice" Gillett continues. "The holes line up, and something you did not plan for brings the whole sequence down. So, the biggest lesson is to keep asking two questions. What can go wrong, and what have we missed? Every operation is a juggling act that needs careful coordination from start to finish. Our platform

is one part of that. The technology helps us react quickly and find the most suitable aircraft and carriers. But the live operation is a separate discipline. It needs very careful planning and oversight, and no platform replaces that. Relationships matter just as much. The work depends on trust between us, the operators, and the people on the ground, and that is built over time rather than in the middle of a crisis."

EAS International's managing director, Adam Komorowski, tells VOTI that "unfortunately" a crisis also creates opportunities for humanitarian channels to be misused. Pointing to one such situation in which EAS was involved, Komorowski says the company dealt with a product which was incorrectly described in the transport and customs documents. Given the shipment had been presented as aid for people in need, EAS had been "strongly" encouraged to organise the shipment at cost. However, during the customs process, Komorowski says that inconsistencies emerged.

"The goods did not match the declarations, some certificates raised serious concerns, and these discrepancies cast doubt on the nature of the consignment and the information we had been given," he continues. "The financial loss was only one part of the risk. The logistics provider could also have been exposed to customs violations and potential legal consequences. This experience taught us that humanitarian logistics requires clear procedures for checking the cargo, documentation, sender, consignee and final beneficiary. If the information is inconsistent, we must be prepared to ask difficult questions and, if necessary, refuse the shipment."

Komorowski says he believes this to be an important lesson to share with colleagues, stressing that "our willingness to help



BEN DINSDALE
Air Charter Service (ACS)

must not remove our professional caution". As such, he says that those active in humanitarian aid must ensure that they have proper controls in place. These controls not only protect transport companies, but they also protect genuine humanitarian channels from being abused by "dishonest operators".

Komorowski speaks from a deep well of experience, having been spearheading EAS's support for shipments into Ukraine since the start of the war. And while EAS remains involved, he notes that the situation has shifted since the start of the conflict. For one thing, he says the volumes are lower. Even so, he adds that many of the shipments that still require EAS' involvement are more difficult and non-standard.

"Our support now often concerns cases where customs procedures, documentation and coordination between several parties are more important than simply finding transport capacity," Komorowski says. "The goods must not only arrive at the border; they must pass the correct procedures and reach the intended beneficiary. We have learned to spend more time verifying what is actually being transported, who is sending it, who will receive it and which documents will be



ED GILLETT
CharterSync

Humanitarian Logistics it is often make or break



ACS quickly established that Caracas airport was usable and the majority of aircraft landed there

required. We also work mainly with people and organisations we know and trust. In difficult cases, expertise, honesty and trust between the parties are often what determines whether the shipment succeeds."

For those who think humanitarian support is just that, Komorowski says that the lessons he and the team have learned have supported the development of the company's wider activities, noting that the same principles apply to other urgent shipments. Be it humanitarian aid, medicines, industrial spare parts, or equipment required to prevent a production stoppage, these all require accurate information, realistic planning and reliable partners.

"Good relationships allow us to react quickly, but clear procedures help all parties understand their responsibilities and identify risks early," he says. "For me personally, however, the most important lesson has

been about people and leadership. Supporting humanitarian shipments has made our team more sensitive to work that serves a purpose beyond normal business objectives. Of course, a company must generate sales and margin, but business also brings a wider responsibility and an

"In difficult cases, expertise, honesty and trust between the parties are often what determines whether the shipment succeeds"

opportunity to support others. From time to time, individuals contact us because they need help transporting medicines or rehabilitation equipment. These are not large commercial projects, but we are in a position to help, both financially and because we believe it is the right thing to do. I am proud that our specialists recognise this responsibility.

"I am equally grateful that many of our partners and agents in other countries share the same approach and are willing to contribute their time, knowledge or services. Not every form of assistance has to be large to matter. Sometimes one shipment, one reduced charge or a few additional hours spent solving a customs problem can make a real difference to someone. Every contribution counts, and I would like to thank our team, partners and agents for continuing to see the human purpose behind the cargo."

It is a sentiment shared by all those VOTI spoke with. With the sense that the lessons learned from this sector were applicable to their wider logistics

activities. Dinsdale notes that the attention to detail required in humanitarian operations is transferable across all charter flights.

"In humanitarian charter ops this attention to detail is often make or break, and if you get it wrong the flight doesn't happen," he says. "Our modus operandi of having ACS representatives on the ground is transferred to the ACS culture of collaboration across the offices. For example, where a charter flight starts or finishes in another country or continent where we have a nearby office, we find it invaluable to include one of our local colleagues from the very start so that they can liaise with everyone involved. We find it is the best way to ensure that complicated charters run as smoothly as possible."

And if Gillett was to point to one area that would benefit from the insight provided by working in crisis zones, he says there is no clearer example than everyday time-critical work.

"A routine urgent shipment can look simple on paper," Gillett says. "Then one thing changes. A delayed delivery to the airport, bad weather, a lost slot, or handling staff not being available, and suddenly you are managing the same chain of risks as a relief flight. The same principle applies whether the cargo is aid or commercial freight. So the habit we have built on humanitarian work, always asking what can go wrong and planning for every scenario, is not something we turn on only for emergencies. It runs through everything we do, and our commercial customers get the benefit of it directly."

The sense is that humanitarian logistics is, in many respects, supply-chain resilience under the most demanding conditions. As such, it can be considered a sector that stress-tests the other operations forwarders and logistics partners may be involved in outside of aid work. Erkeskin notes that with humanitarian operations requiring "considerably more than arranging transportation," there are lessons learned that are directly applicable to the company's commercial logistics work. Exemplifying this is the ability to juggle additional documentation

and customs procedures alongside the security considerations and local disruption that arise within disaster zones.

"This experience has directly influenced our commercial work," Erkeskin says. "Today, when designing a supply chain for a customer, we increasingly ask not only what the most efficient route is, but also what happens if that route suddenly becomes unavailable. The importance of alternative routing is therefore one of the clearest lessons. The experience gained from operating in disrupted environments has reinforced our approach of not relying on a single route, carrier or mode of transport. If a port becomes congested, a border closes or capacity disappears, we need to know what Plan B, and sometimes Plan C is."



He adds that the same is applicable to relationships, pointing out that humanitarian operations demonstrate "very clearly" that technology and systems are important, but trusted relationships remain essential. Amid a situation with abruptly changing circumstances, what forwarders crave are "reliable partners" who understand the local environment and can make decisions quickly. Having a network like this on hand, he says, can make the difference between a shipment moving and remaining stranded. But perhaps the biggest lesson Erkeskin and the team have learned is that resilience cannot be created after a crisis begins.

"Whether we are transporting humanitarian supplies or commercial cargo, resilience has to be designed into the supply chain beforehand," he says. "The humanitarian work we have been involved in has therefore influenced the way we approach our wider business. We encourage our teams to think beyond simply moving cargo from A to B and instead understand the vulnerabilities of the entire supply chain, anticipate what might go wrong and prepare alternatives in advance. In today's increasingly unpredictable world, I believe this ability to adapt is becoming one of the most important capabilities a logistics provider can offer."



ADAM KOMOROWSKI
EAS International



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Tech boom sees Asia-US air exports soaring

ASIA'S air cargo export market is approaching its peak season with bifurcating flight paths, with Europe-bound flows in the doldrums as an AI-fuelled boom is sending demand to the US soaring.

Nowhere is spiking demand more evident than in the tech frenzy ensnaring Taiwan, which witnessed a smashing of its records in July as export orders surged 61.9 per cent year on year to some \$98 billion in value.

Much of that demand was coming from the US, which recorded a record monthly jump in orders, up 88.9 per cent, to \$40.8 billion, propelled by an 89.5 per cent spike in demand for information and

communications technology products.

Taiwan's Ministry of Economic Affairs said

booming orders for AI servers and the cooling systems needed to keep them running had blown past expectations, with that demand translating into real shipments as the spending spree supercharges air cargo demand.

SATS chief executive Kerry Mok told the UK Financial Times the handler was seeing server racks, storage systems and GPUs raced across the world as technology firms endeavour to keep to schedule on data centre builds.

The AI gold rush is

creating a widening gap between US and European air cargo markets, with combined China and Hong Kong cargo volumes to the US up 13 per cent year on year in August, according to WorldACD, while European shipments slumped 14 per cent.

As noted in the lead, the source of this gloom is the EU scuppering of cheap Chinese ecommerce exports to Europe, although the latest Freightos Air Index indicates some budding signs, China-North Europe rates up six per cent in the first week of September.

TAC Index also spotted signs Asia-Europe freight rates began to steady in the second half of August after weeks of declines, but another headache is looming for airlines – soaring fuel costs, and it seems carriers will try and make customers carry the burden.

Per TAC, average jet fuel



KERRY MOK
SATS

prices found themselves 74.2 per cent year on year by 29 August, having climbed 8.2 per cent in that month alone, with little to indicate that those prices would be falling anytime soon.

Cathay Pacific has been hot on this front, upping its long-haul cargo fuel surcharge from Hong Kong to HK\$11.20 per kilogram over the first week of September, having hovered around the \$6.70 mark just six weeks ago.

'Nowhere is spiking demand more evident than in the tech frenzy ensnaring Taiwan'

Designate lithium batteries as 'dangerous goods' call

CONTAINER shipping lines are on the verge of demanding that all lithium-ion battery shipments be classified as 'dangerous goods', following a wave of fires at sea sparking fears the industry is facing a safety crisis.

Such a move would mark an end to an exemption allowing millions of lithium batteries to be shipped under lighter regulations – indeed, a report from maritime consultancy Tigris and Thetius calling this loophole an "operational blind spot".

The latest sortie against unchecked battery flows comes just weeks after a fire aboard the 8,000 teu CMA CGM Petra shortly after it left Singapore on 23 August. The vessel is now at anchor as investigators work to determine the cause.

While no link has been established, the incident has again focused attention on lithium-ion batteries, which have become one of the shipping industry's biggest fire risks.

It has been claimed that containership fires have become so common that a serious blaze now breaks out every 17 days, exposing crews, ports and insurers to mounting risks, with carriers believing greater visibility is the only way to tackle the problem.

A new position paper from the Cargo Incident Notification System (CINS), whose members include 14 of the world's largest container lines, suggests the current rules no longer reflect the explosion in battery shipments.

Under Special Provision 188 (SP188), many lithium batteries can be transported without being declared as dangerous goods, if they meet testing and packaging requirements, but carriers say that exemption was created for a different era.

With lithium batteries now included in everything from power tools and household appliances to electronics, scooters and consumer goods, it has become far more difficult for crews to know exactly what is inside a burning container.

CINS is urging mandatory dangerous goods declarations for all lithium-ion shipments – including those covered by SP188 – and strict limits on how many batteries can be loaded into a single container, recommending a limit of just 20 kilograms.

Tigris and Thetius has backed that call, its report warning that lithium batteries often appear as routine cargo and therefore escape the scrutiny applied to fully regulated dangerous goods.

Shipping alliances are avoiding competing on east-west routes

CONTAINER shipping's biggest alliances seem to be opting out of competing with one another and are instead moving to carve up the world's trade routes between them, according to new analysis from Sea-Intelligence.

The consultancy examined direct port-to-port services operated in July by the Gemini Cooperation, MSC, and the Ocean and Premier alliances. While not formally part of an alliance, MSC was included because of the scale of its standalone network.

It revealed a market increasingly defined by rivals staking out their own territory rather than competing on the same routes, with Sea-Intelligence finding 54 per cent of transpacific port-pair connections served by just

one alliance, rising to 65 per cent on the Asia-Europe trade.

"This shows a high degree of specialised connections in an otherwise commoditised market," the consultancy said, noting Ocean Alliance boasts the biggest direct transpacific network, serving 169 unique port pairs with 748 direct connections at an average 4.4 sailings per route.

While the Premier Alliance covers 116 unique pairs, it offers the highest frequency at 5.2 connections per route with Gemini servicing 70 unique pairs, averaging 4.8 connections, and MSC running the leanest network, at 84 pairs with 2.6 connections per route.

On Asia-Europe, the picture changes, with MSC topping the number of pairings (241) and averaging 4.1 connections per route; Ocean Alliance follows with 235 pairs at 4.9 connections, with Gemini and Premier serving 106 and 122 unique pairs respectively.

Key to note, however, was how little overlap there is between the alliances; just 21 per cent of Asia-Europe port pairs are served by two alliances, nine per cent by three, and only five per cent by all four of those tallied.

There is more competition on the transpacific, albeit

marginally so: 24 per cent of routes are shared by two alliances; 16 per cent by three and seven per cent served by four, and there are some clearly dominant players.

Ocean Alliance controls 51 per cent of the transpacific's exclusive routes, followed by Premier on 26 per cent, with MSC on 15 per cent, and Gemini on holding an eight per cent share of exclusive routings. MSC dominates port pairings on the Asia-Europe trade, holding a 40 per cent share, with Ocean slightly behind on 34 per cent, but both well ahead of Gemini and Premier on 16 and 10 per cent, respectively.

Added to this, the report also found very different regional strategies, with Premier sending 78 per cent of its exclusive transpacific routes to the US west coast, while MSC focuses heavily on the east coast, where 80 per cent of its unique connections are based.

On Asia-Europe, Gemini, Ocean and Premier all

concentrate their exclusive services on the Mediterranean, accounting for 72, 67 and 67 per cent of unique port pairs, but MSC breaks the mould, by splitting its network: North Europe (49 per cent) Mediterranean (51 per cent).

Sea-Intelligence said that the findings suggested the "carrier alliances are designing highly specialised

direct networks to differentiate their commercial products", rather than simply duplicating competing services. Global Shippers' Forum director James Hookham, however, warned that alliances still gave shipping lines enormous

market power, limiting shipper choice when schedules slip or surcharges are imposed.

"The dynamic is obviously, and always has been, in shipping lines' favour, given the concentration of market power there, and that's certainly what the GSF and others have been so focused on – making sure that dominant position isn't abused," he said.

New Chinese canal project welcomed by shippers

CHINA is set to open a massive new trade artery next week, a move designed to slash shipping costs and tighten its grip on commerce with South-east Asia.

Opening on 15 September, the \$10.8 billion Pinglu Canal will link China's south-western city of Nanning with the Beibu Gulf, which stretches between China and Vietnam, allowing some 5,000 tonnes of cargo to bypass more costly road freight and move by sea.

Shipping costs for containerised freight will be halved on the waterway, from the \$387 per 40 foot manufacturers pay to truck their cargo out.

Hailed as a "project of the century," the 134-kilometre canal will be welcomed by manufacturers in the country's south-west, as they have long relied on trucks to reach ports.

In Beijing, the hope is that the canal will help spur growth in bilateral trade with South-east Asia well north of the record \$1 trillion it reported last year, with trade flows having already hitting \$766 billion over the first seven months of 2026.

Not only does it mark the first major canal planned at since the founding of the people's republic in 1949, but it is also the New International Land-Sea Trade Corridor's flagship project.

As part of the preparation for opening, China's Maritime Safety Administration has published official nautical charts covering the canal approaches, and final navigation aids have been installed along the seaward section.

The new charts provide continuous coverage from the new 22-kilometre coastal stretch through to Qinzhou Port, ensuring vessels can navigate safely into the Beibu Gulf.

"The dynamic is obviously, and always has been, in shipping lines' favour"



JAMES HOOKHAM
Global Shippers Forum

Spotlight ON

Nigel Pusey

SME forwarders: 'Poland is one to watch' with Sub-Saharan Africa on the rise

ASK Container Trades Statistics (CTS) chief executive Nigel Pusey which lanes are offering the biggest opportunities for small and medium-sized forwarders and he will highlight what happened between Poland and the Far East over the past 12 months. "From a European perspective," he says, "Poland is one to watch".

Using data gathered by CTS, it is obvious he is on to something. Since last year, volumes on the route have surged some 25 per cent year on year.

The intent of CTS – which counts major shipping lines as its shareholders, although it is managed independently – is to provide a granularity of data that others cannot. The content of that data surrounds what volumes were actually moved in preceding months and the level of change

against the preceding year. It achieves this by having access to freight flows across 135,000 port pairings globally, which allows it to track the shifting nature of the supply chain and differentiate between an aberration, an expected seasonal spike, or a

developing pattern.

"The biggest use of the data we are seeing from forwarders concerns the country data that we offer," Pusey tells Voice of the Independent (VOTI). "Because of the number of port pairings and our relationship with the carriers, we are able to offer accurate analysis of how many boxes came in and out of a country and that allows them to plot their own number of boxes against it and get an insight on their market share."

Having this data, Pusey says, has value for forwarders for a multitude of reasons. Not least being that it allows them to draw out developing market trends and perhaps capitalise on those lanes that other forwarders have yet to cotton onto. Importantly, he says, the "lagging rather than forward

index" design of CTS allows it to tell forwarders, "Exactly what's been invoiced because it comes from the invoices from the lines". And this is a value Pusey says SMEs should be taking advantage of.

"Sometimes, there is a sense from SMEs that they do not need this sort of data," Pusey tells VOTI. "But I think we are seeing a shift in the mindset of forwarders. And there is greater interest in what we have to offer because of the granularity of data surrounding development in volumes and rates but there is also a flexibility in our offering."

That flexibility, Pusey adds, means that the smaller forwarders that maybe cannot afford the entire package can acquire just the

data they need. And as such allows them to better research the market and the potential for new avenues of business. As an example, he returns to the development in trade between Poland and the Far East. While he acknowledges that some forwarders may pick this up simply by knowing the market or having conversations, he says that having this underlying data – which allows for trends to be pulled out – affords them an opportunity to better manage, plan, and tap into emerging markets. So, Poland-Far East aside, where has he seen growth?

"The other big growth one is Asia to South and Central America," Pusey continues. "We are seeing a lot more happening there and while we cannot yet say for certain what is in the containers, what we do know is that the region represents a growing consumer market but also that China has realised it was unlikely to see much more growth in its US-bound volumes."

This shift in Chinese thinking, he says, has been "quite fascinating" to watch. Pusey believes it is also making itself felt across other regions, pointing out that he has seen more movement of Asian goods into North Africa and the Eastern Mediterranean. This reflects what VOTI has been hearing from a number of forwarders who have highlighted all three as particular growth spots for them. "And I think if you look at the first six months of 2026, our data has shown that two thirds of global growth is coming from those trades". But there is another market that has caught the eye of CTS and forwarders alike: Sub-Saharan Africa.

"Asia to Sub-Saharan Africa is probably the standout trade in absolute trade growth terms at the moment," Pusey says, pointing to two years' worth

of recorded volumes. "We have seen growth of roughly 30 per cent a year for the last two years. And it is especially the case that East and West Africa are making themselves felt in this respect. From the West Africa perspective, the sense we get is that growth is being prompted by a combination of factors, not least an increasing consumer base but also a series of UN projects intendant on developing a trans-Western Africa railway."

Given the recent and rapid rise in Sub-Saharan Africa's trade growth, is CTS confident in the accuracy of its data? Pusey thinks so, describing it as "extremely accurate," noting the same of its coverage for South and Central America, which he

puts at more than 90 per cent. That strength of coverage is even more apparent for the Far East-Europe trade.

"We represent 99.8 per cent of every box moved between Shanghai and Hamburg,"

Pusey continues. "So, when we tell you what the North Europe China rate is, we are pretty accurate. We know that is exactly what

was invoiced. It gives people certainty. But it is a different way of looking at data. And perhaps not one forwarders are used to."

If these are the trades on the up, he also notes that there are a few on the decline, citing Europe and

chief executive
Container Trades Statistics

Australasia – "although I cannot think of too many others, to be honest". On the European front, he says this has been a noticeable trend over the past couple of months, pointing out that for "every three and a half boxes that come out of the Far East, Europe is selling one of

these back".

Pusey says that he hopes what CTS can offer "makes for an enticing proposition for SME forwarders. We have the information we believe can give them the certainty they need on trade flows".

"We have the information we believe can give them the certainty they need on trade flows"

"The biggest use of the data we are seeing from forwarders concerns the country data that we offer"

Warning to US importers as CBP brings in AI

TRADE experts are warning that US importers are increasingly being investigated "months after shipments have been released", as customs officials use AI to hunt for signs companies are dodging tariffs.

During a CargoTrans webinar, its trade compliance director, Rennie Alston, said importers were making a dangerous mistake by assuming a shipment was safe once it had been waved through at the border, stressing it was merely a "conditional release".

Alston warned that US Customs and Border Protection (CBP) could continue scrutinising an entry for 314 days, using a process known as liquidation, adding that importers are also required to keep supporting records for five years.

The warning comes as companies scramble to reshape supply chains in response to volatile tariffs, switching suppliers, changing sourcing routes and altering countries of origin, but it is "exactly" these changes that customs officials are looking for.

CargoTrans co-chief executive Nunzio De Filippis said CBP's growing investment in AI means it can now analyse years of an importer's trading history, spotting unusual patterns far faster than before.

Instead of checking shipments one by one, Customs is increasingly looking for trends that could suggest companies are trying to sidestep tariffs, with Alston warning that

sudden changes in declared values, product classifications or country of origin could immediately raise red flags, unless businesses can prove there is a legitimate commercial reason.

"Customs has the mentality that you are guilty on the appearance of non-compliance until you can demonstrate reasonable care," he said, meaning importers can no longer rely solely on suppliers or customs brokers to get declarations right.

Rather, companies need to understand every stage of a shipment before it leaves the factory, from purchase orders and invoices to origin, classification, declared value, with Alston urging a regular examination of customs data and auditing of brokers.

"Never say 'this is how we've always done it,'" Alston added, noting that these could be the very words that persuade Customs to widen an investigation from one shipment to years of imports.



Last-gasp peak rush keeps transpac rates on a high

CONTAINER spot freight rates on the transpacific and Asia-Europe trades headed in opposite directions this week – a last-gasp peak season rush, sending US prices soaring while Europe rates sank even further.

Drewry's World Container Index (WCI) for the first week of September recorded a three per cent week-on-week surge on Shanghai-New York, to \$9,587 per 40 foot – almost three times the \$3,677 seen this time last year.

Meanwhile, the Shanghai-Los Angeles route jumped five per cent, to \$7,185 per 40 foot, with the spike across both trades fuelled by a fresh round of general rate increases (GRIs) on 1 September, many of which held.

One US west coast forwarder told Voice of the Independent (VOTI) the GRIs likely tacked \$300 to \$500 on top of the prices over the course of the week, with the potential for them to remain elevated.

Carrier discipline has also helped, as they

kept a tight grip on capacity just as importers scrambled to beat the closing window for stocking US shelves ahead of the Christmas shopping season.

The forwarder said: "Ocean carriers have successfully managed vessel supply by implementing strategically targeted blank sailings, modifying vessel rotations, and pulling capacity from select lanes to maintain pricing power".

They added that both consumer and commercial demand had also remained strong, noting that volumes have risen nine per cent week on week to the US west coast and three per cent to the east coast.

As this issue was going to press, Drewry's Container Capacity Insight was reporting that carriers had already announced six blanked sailings on the transpacific for next week, twice as many as this week, prompting the analyst to predict rates will stay firm.

If things are looking rosy for carriers on the transpacific, it is a different story for Europe,

as spots on the Asia-Europe trade continued their relentless slide; the Shanghai-Rotterdam rate dropping five per cent, to \$4,092 per 40 foot.

On Shanghai-Genoa, the slump was even more pronounced, down 10 per cent, to \$4,368 per 40 foot, with one European forwarder telling VOTI that September quotes were already below those levels, with little chance of a near-term rebound.

The forwarder added: "Demand levels have dropped off, there are no issues with bookings or allocations, and rates would decline quicker if it wasn't for port congestion or blanked sailings."

Per Linerlytica, Gemini partners Maersk and Hapag-Lloyd are leading the price-cutting battle, offering \$3,500 to \$3,800 per 40 foot for sailings in the first half of September, undercutting rivals charging \$3,900 to \$4,400, and some forwarders are pushing lower.

One unsolicited offer seen by VOTI quoted \$2,799 per 40 foot from China to Felixstowe and Southampton for the rest of September, suggesting some are scrambling to offload unwanted allocations before they are left

"Ocean carriers have successfully managed vessel supply"

Return to Suez could trigger collapse in shipping demand

CONTAINER shipping's full-scale return to Suez Canal transits could trigger a shock 8.7 per cent collapse in global shipping demand next year – even if world trade continues to grow at the present rate.

That's the stark warning from Sea-Intelligence, which said the industry's post-Red Sea boom could quickly unravel as carriers abandon the long detour around the Cape of Good Hope.

According to Sea-Intelligence, 19 per cent of Asia-Europe capacity is now sailing through the canal, after Maersk, Hapag-Lloyd, and MSC joined CMA CGM in shifting services back to the route, alongside smaller operators like Fesco and CU Lines.

Carriers had been on the back foot following their Covid-era gold rush before they were handed an unexpected boost by the December 2023 launch of Houthi attacks against shipping in the Red Sea that forced vessels around the Cape.

A return to Suez would wipe out that advantage, with Sea-Intelligence modelling three possible outcomes, based on the assumption that underlying cargo demand continues growing at the 6.6 per cent annual average seen over the past 12 months.

Should just 19 per cent shift to Suez, global head-haul teu-mile demand growth would slow to 3.8 per cent in the first half of 2027, if the amount was 50 per cent between August and December, demand would reverse, shrinking by 1.1 per cent.

But the report said that if every head-haul service returned to the canal by the end of the year, global head-haul container demand would crash some 8.7 per cent year on year during the first half of 2027.

For carriers, the report makes grim reading, with Sea-Intelligence considering a full return the most likely outcome – provided the Red Sea remained safe – because carriers continuing to route ships around Africa would

have the higher costs and longer transit times.

Although, it left a little wiggle room: expectations that some capacity on Europe-Asia backhaul services would route around the Cape to help absorb excess capacity, which is only expected to climb with a wave of new orders set to hit the market.

Even so, the analyst stressed that freight markets would be driven by head-haul demand rather than backhaul volumes, and noted that "in the absence of any new escalation, the math is quite straightforward".

It concluded: "We will see negative demand growth in 2027, even if underlying head-haul container demand remains strong. This is purely the result of ships travelling shorter distances."



"We will see negative demand growth in 2027"

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It looks like there is little chance of respite for rates, with Drewry's Container Capacity Insight showing blankings on Asia-Europe falling from four to just one, injecting more capacity into a market that's already losing momentum.

The end could also be nigh for the strong transatlantic market, despite the fact that the WCI's Rotterdam-New York leg inched up one per cent this week, to \$3,052 per 40 foot, and there have been a number of carriers attempting rate hikes on the route.

For instance, MSC announced a peak season surcharge on West Mediterranean-North America shipments of \$600 per 40 foot from 1 October, with CMA CGM announcing one of \$2,000 per 40 foot on North Europe-US shipments from 20 September.

But they remain outliers among the major carriers, and one forwarder active on the lane told VOTI that the market was proving increasingly competitive in terms of pricing.

The forwarder added: "I know a couple of carriers have tried for rate hikes, so we're avoiding them for the time being. There are options out there with no rate increases and space available, and we even had a slight decrease from one of our carriers."

Voice of the Independent

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