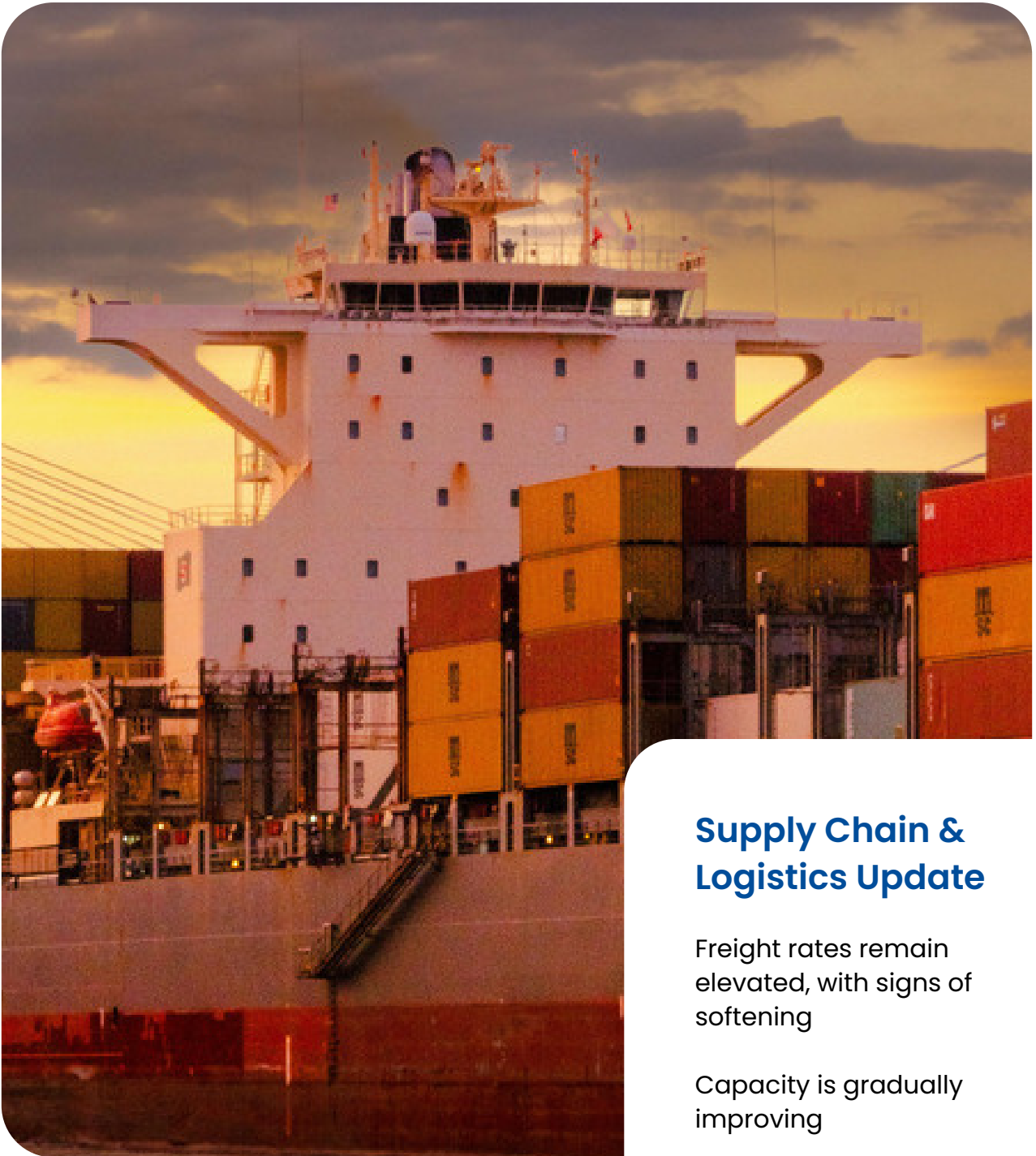


Freight Expectations



Supply Chain & Logistics Update

Freight rates remain elevated, with signs of softening

Capacity is gradually improving

Port congestion affecting operations across China, Jeddah and India



At A Glance Monthly Market Update

- Freight rates remain above historical levels, although signs of easing are emerging on some Far East–Europe services. Mediterranean routes continue to command a premium over Northern Europe as regional congestion and demand continue to influence pricing.
- Capacity is gradually improving across key trade lanes, with carriers introducing additional vessels and charter tonnage. However, congestion and network disruption continue to affect available space and schedule reliability.
- Port disruption continues to impact global supply chains, with congestion across China, Jeddah and India contributing to longer waiting times, schedule changes and delays throughout international shipping networks.
- Container shipping reliability remains under pressure, as vessel delays, missed berthing windows and ongoing congestion continue to create knock-on disruption and unpredictable transit times during the peak season.
- Planning ahead remains essential for shippers, with early bookings, additional lead time and flexible routing strategies helping to minimise disruption as market conditions continue to evolve over the coming months.

Ocean Freight Global Market Overview

The market remains in a typical peak season environment, although signs of stabilisation are beginning to emerge across several major trade lanes. Demand remains healthy, but the sharp freight rate increases seen earlier in the summer are beginning to moderate as additional vessel capacity enters the market and competition for cargo gradually increases.

Freight rates remain elevated by historical standards, particularly on Mediterranean services where congestion and tighter vessel availability continue to support pricing above Northern Europe. However, rates into Northern Europe have started to soften on some services as carriers adjust capacity and respond to changing market conditions. The result is an increasingly varied pricing landscape across Europe, making routing decisions more important than ever.

Capacity is gradually improving as carriers introduce additional vessels and secure charter tonnage to meet seasonal demand. Despite this, congestion at key ports across China, Jeddah and India continues to disrupt schedules, reducing network reliability and creating delays that ripple throughout global supply chains. While selected services have cautiously returned to the Suez Canal, transit times remain variable and operational disruption has not yet fully eased.

Equipment availability remains broadly stable across most export markets, with shortages significantly less widespread than during previous periods of disruption. However, ongoing congestion and schedule volatility mean shippers should continue to book freight in advance, allow additional lead time where possible, and remain flexible with routing decisions to minimise the impact of delays.



Europe's Freight Market Remains Split

- *Mediterranean rates remain ahead of Northern Europe*
- *Regional congestion continues to support higher pricing*
- *Choosing the right gateway can significantly reduce costs*



Ocean freight rates between Asia and Europe are becoming increasingly uneven, with rates to the Mediterranean climbing significantly higher than those to Northern Europe. The widening gap is being driven by stronger demand, ongoing congestion at key Mediterranean ports, and tighter vessel capacity on southern European services.

While Northern European rates have stabilised, carriers continue to command premiums on Mediterranean routes, highlighting how regional conditions are shaping pricing across the trade lane.

Key takeaways

- Mediterranean rates continue to rise, creating one of the widest pricing gaps with Northern Europe in recent years.
- Port congestion and tighter vessel capacity are driving higher costs on southern European services.
- Shippers should review routing options and budget forecasts, as freight rates can vary significantly depending on the final destination within Europe.

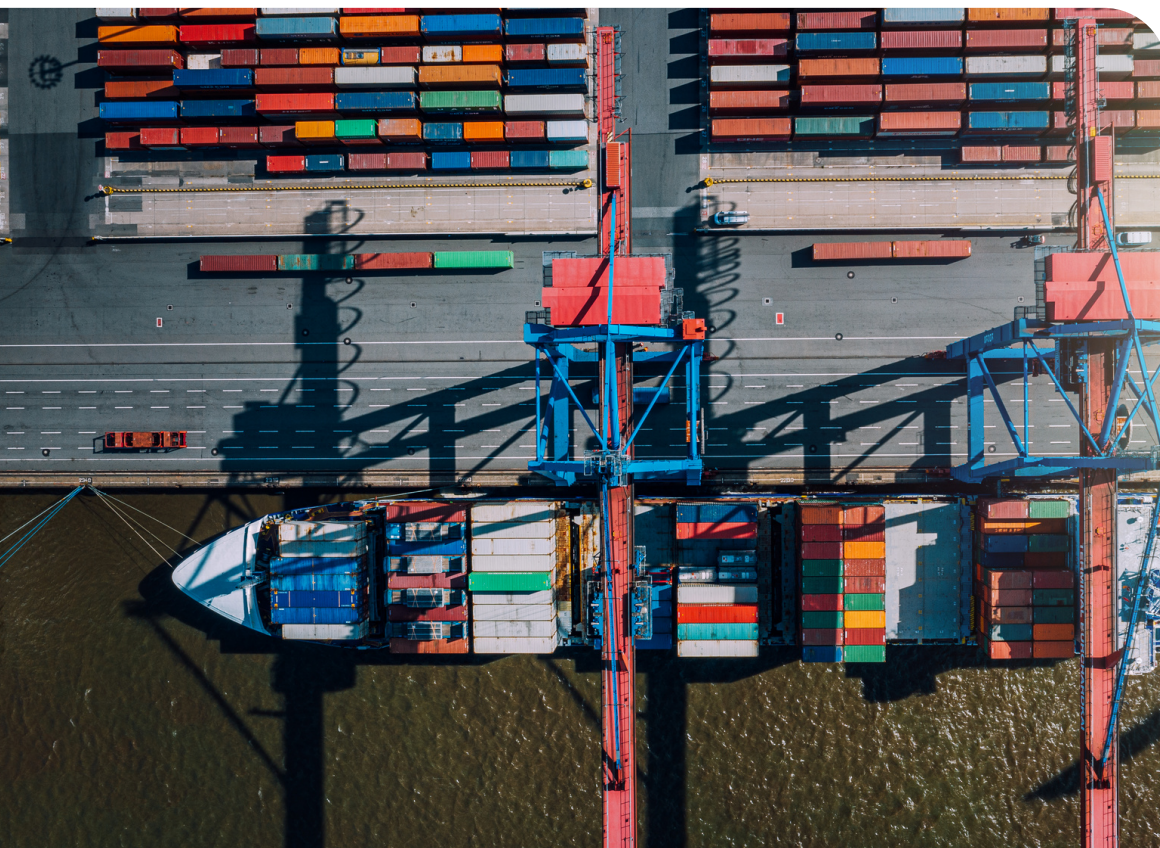
Schedule Reliability Remains Under Pressure

- ***Schedule reliability remains below expected levels***
- ***Port congestion continues to disrupt global vessel schedules***
- ***Building additional lead time remains essential for importers***

Container shipping schedule reliability remains under pressure as congestion at major ports continues to disrupt global vessel schedules. Delays across key gateways in Asia, Europe and the Middle East are resulting in extended waiting times, missed berthing windows and ongoing knock-on effects throughout carrier networks.

Although some capacity has returned to the market, operational disruption continues to make transit times less predictable. Congestion at several major ports, combined with network adjustments and regional delays, is limiting carriers' ability to consistently maintain published sailing schedules.

For UK importers, reliability remains one of the biggest operational challenges. Planning shipments well in advance, allowing additional lead time and maintaining flexibility where possible will help minimise the impact of delays as peak season progresses.



Jeddah Congestion Continues Despite Positive Suez Developments

- ***Jeddah port congestion continues to disrupt vessel schedules and supply chains.***
- ***Maersk has resumed selected Suez Canal services, signalling improving confidence***
- ***Transit times remain unpredictable***



While some ocean carriers are beginning to restore services through the Suez Canal, disruption in the Middle East remains far from over. Congestion at Saudi Arabia's Port of Jeddah continues to impact operations, with delays affecting vessel schedules and onward connections. At the same time, Maersk's return to a Suez-based service on selected routes is a positive sign that confidence in the region is gradually improving.

Key takeaways

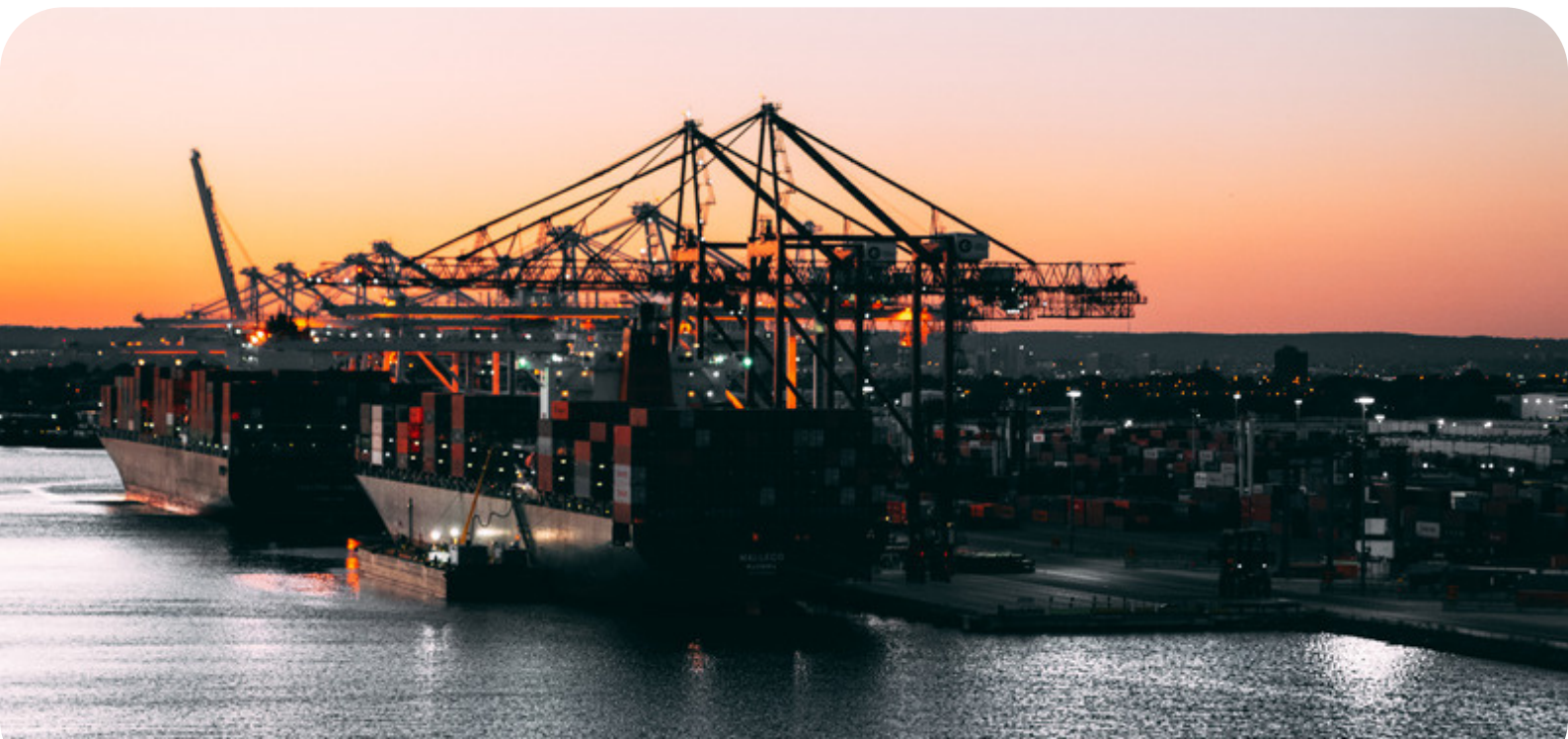
- Congestion at Jeddah is continuing to create delays for cargo moving through the Red Sea.
- Maersk has restarted a service transiting the Suez Canal, signalling cautious confidence in the route.
- Most carriers are still taking a phased approach, with many services continuing to avoid the Red Sea.
- Transit times remain unpredictable as carriers balance security risks with network efficiency.
- UK importers should continue to plan ahead and allow additional lead time for shipments from Asia.

Operations Halted at Key Indian Container Terminal

Operations at Nhava Sheva Freeport Terminal (NSFT) at India's JNPA port were temporarily suspended following a fatal dockside accident. While terminal activity is expected to resume once investigations are complete, the disruption is likely to cause short-term vessel delays and congestion at one of India's busiest container gateways, with potential knock-on effects across Asia-Europe services.

Charter Market Strength Signals Ongoing Capacity Pressure

The container charter market is gaining momentum as shipping lines continue to secure additional vessel capacity to meet strong demand. Rising charter rates reflect limited vessel availability and increasing ocean freight rates, suggesting carriers expect market conditions to remain tight through the coming months. For importers, this reinforces the importance of booking early to secure space and manage transport costs.



Take control of your supply chain today

No two logistics challenges are the same. I understand this and I'm here to tailor solutions to meet your specific needs. I can work closely with you to develop strategies that address your unique challenges effectively and efficiently, offering guidance that allows you to plan and adjust logistics strategies accordingly.



Want to get in touch.

[Click here if you want to get in touch with me about any queries or concerns you have.](#)

A grayscale background image showing a person's hands typing on a laptop keyboard. Several translucent, floating icons of documents and folders are positioned above the laptop, suggesting digital workflow or data management.

Book a Demo of Pathway now

TECHNOLOGY SERVICES