WORLDWIDE LOGISTICS

GLOBAL TRANSPORTATION MARKET REPORT

November 2026






Executive Summary: 60-Day Shipper Outlook

- **Ocean trades:** Asia-Europe rates ease slowly, while Asia-U.S. and transatlantic continue to slide. As of Nov. 13, the Shanghai Container Freight Index was 3,572 (down 1.7% on the week), with the U.S. West Coast at $7,111 per FEU (-3.7%), the U.S. East Coast at $9,387 (-4.8%) and North Europe at $2,291 per TEU (-1.5%). Carriers expect a strong December on Asia-Europe; shippers should not anticipate significant decreases in rates.
- **Ocean capacity and schedules:** U.S. imports should decline as year-end approaches, but space is still tight and shippers should book three to four weeks ahead. Transatlantic cancellations run around 9% and jump to about 19% in weeks 47 and 51. Suez Canal loops will return gradually (Gemini's AE1-AE3 from 4 Dec to 14 Jan); expect crowding and ~two day wait times at Rotterdam and Antwerp.
- **Ocean surcharges:** ETS (allowances near €90) and FuelEU charges remain, as do war-risk surcharges on Gulf-linked lanes while the Strait of Hormuz is disrupted. Carriers typically reset BAF, GRIs and tariffs around Dec. 1 and Jan. 1. Oil under $100 slows BAF increases.
- **Labor calendar:** Nov. 23: Spanish rail strike and Brussels demonstration. Dec. 4: Italy general strike. French strike action and the French National Railway Company (SNCF) notice run to Dec. 15; Saint John, Canada could follow in January. Yantian berth 12 is closed through the end of November, and London Gateway is restricted to mid-December.
- **Ocean rate and timing risks:** Watch for news about a strike at Port of LA/Long Beach, Red Sea attacks that spur carrier rerouting via the Cape of Good Hope, a Strait of Hormuz escalation, and/or pre-Lunar New Year front-loading in January.
- **Events that could exert downward rate pressure:** Released Suez Canal capacity, the swelling 16 MTEU orderbook, and weaker U.S. imports could drive spot rates down in Q1. Shippers should consider shorter or index-linked contracts over locking in today's levels.
- **North American road:** Expect van spot rates to continue rising through December, peaking near January. Contract rates are roughly 18-22% above last year, and diesel surcharges should stay high into 2027. Cross-border capacity likely to remain tight into 2027.
- **What to do now:** Book three to four weeks out, add five to seven days of buffer time on North Europe imports, spread West Coast, East Coast and Canadian routings to hedge against Port of LA/Long Beach strike risk, spell out how ETS and FuelEU are charged (fixed or indexed) in Q1 contracts, and audit invoices for war-risk, ETS and FuelEU lines.

Global Ocean Trends — Market Summary

Rates are easing from a high base
Despite the Shanghai Containerized Freight Index trading at three times as much compared to its level from a year ago, analysts report falling prices on most major trade routes. Oil has also dropped back below $100 per barrel.

Suez Canal returns continues
Red Sea-routed loops now carry 63% of Far East-Europe capacity, eight of the top 10 carriers are utilizing or plan to return to the Suez Canal, and Evergreen began ad hoc transits in November. Note, many loops still return to Asia via the Cape of Good Hope route.

Newbuilding wave keeps growing
The global orderbook is nearing 16 MTEU. Meanwhile, Hengli Dalian has become the No. 2 builder (2.47 MTEU), MSC is negotiating 10 more 24,000 TEU megamaxes plus 10 upgrades, and analysts expect Maersk and Yang Ming to place additional orders soon.

Carrier earnings surge
Maersk's third-quarter liner EBIT hit $2.6 billion (up 46%), and the carrier lifted its 2026 EBIT guidance to $8 billion-$8.5 billion. ONE quadrupled its operating profit and raised its full-year net profit forecast to $2 billion.

Lofty charter market rates
Pricing remains at a four-year high, drive by scarce tonnage for every vessel size. However, returns to the Suez Canal and the giant orderbook threaten charter rates and asset values.

Congestion and security risks persist
The Strait of Hormuz remains "de facto closed" with slightly less than140,000 TEUs idle in the Persian Gulf. Some carriers report port waits peaking at 16+ hours (the highest since January 2023), and a drone was shot down near a ship in the Red Sea.



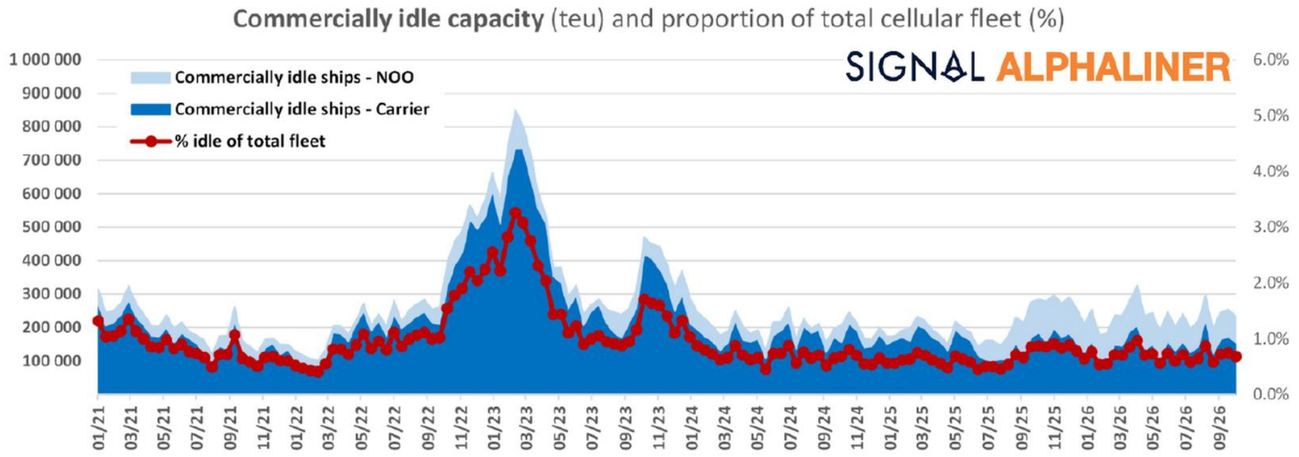
Labor Disruptions and Port Issues

- **Advice for shippers:** Expect rolled bookings and late arrivals at French, Spanish and North European gateways over the next two weeks. Explore alternative routings, allow extra days on time-sensitive freight, and watch the Port of LA/Long Beach negotiation deadline if you import through the U.S. West Coast.
- **China and Japan:** Yantian berth 12 is closed through November after a crane collision on Nov. 9, adding three to five days to two services. APEC security restrictions hit Shekou and Yantian on Nov. 16-20, and Yokohama is short of labor with yards above 110%.
- **France:** Dockers walked out for 24 hours on Nov. 17 at Le Havre, Marseille-Fos, Rouen and Nantes-Saint-Nazaire, the third strike call in as many weeks. Kuehne+Nagel expects some vessel delays at Le Havre but no berth congestion. Additional job actions are planned this week, and the French National Railway Company (SNCF) strike notice runs to Dec. 15.
- **Italy, Germany, Belgium and Canada:** Italy had/has general strikes on Nov. 20 and Dec. 4. Germany's IG Metall is moving to 24-hour warning strikes. Brussels has a demonstration on Nov. 23, but no port impact has been announced. In Canada, Saint John dockworkers have authorized a strike, though the earliest action is not until January.
- **Middle East, South Asia and Africa:** Anchorage waiting capacity hit a record 500,000+ TEUs, and Colombo is causing missed feeder connections. Waits run about 11-1/2 days at Conakry, eight days at Beira and six days at Tema. The Strait of Hormuz is still disrupted, and Iran made an unverified claim that four tankers were hit on Nov. 12.
- **North Europe:** Congestion is building as Suez Canal transits return. Rotterdam waits are about two days, with Hamburg and Bremerhaven at one to two days. London Gateway is about three days, with berth restrictions in place until mid-December.
- **Port of LA/Long Beach:** The union and port employers have pushed the watchmen strike deadline back multiple times. Only about 250 watchmen are involved, but their terminals handle the majority of Long Beach cargo and a third of LA's. For now, ports are running normally.
- **Spain:** A general strike on Nov. 11, the first in 14 years, halted container handling at Algeciras, Valencia and Barcelona for the day. Trucking was largely unaffected, but a backlog was expected on Nov. 12 and 13 with rail strikes set for Nov. 17 and 23.

Capacity and Idle Fleet

- As of Nov. 2, 98 commercial vessels are idle, totaling 253,859 TEUs or 0.7% of the global fleet)
- In-yard capacity totals 162 ships representing 766,757 TEUs or 2.2% of fleet) after October's drydock surge
- Suez Canal returns freed less capacity than expected due to port congestion and many loops returning via the Cape of Good Hope route
- Recent deliveries include EVER EDIFY (16,556 TEUs, ninth of 16 methanol dual-fuel ships for Evergreen) and OOCL ECUADOR (13,580 TEUs)
- The orderbook is nearing 16 MTEU, including 40 new megamax orders that will add roughly 1.0 MTEU
- Large mainline vessels remain scarce in the idle pool — only two 12,500+ TEU ships are currently idled





Idle Fleet Breakdown by Vessel Size (more than 500 TEU, as of Nov. 2)

Less than 1,000 TEU: 32 ships
1,000-2,000 TEU: 26 ships
2,000-3,000 TEU: 18 ships
3,000-5,100 TEU: 8 ships
5,100-12,500 TEU: 12 ships
Large mainline (12,500+ TEU): 2 ships

Total idle: 98 ships / 253,859 TEU (0.7% of fleet)



Ocean Trade Lanes

Africa/Indian Ocean: Feeder activity continues. Emirates Shipping Line reorganized its Western India-Red Sea loops and launched a China-Red Sea "CRC" service. GT Lines upgraded "KCX1" with three new partners, keeping ample capacity available.

Far East-Middle East/Red Sea: Suez Canal returns are expanding as Red Sea-routed loops are now carrying 63% of Far East-Europe capacity. Premier Alliance is moving two more loops to the Suez Canal, Evergreen is beginning ad hoc transits, and Gemini is relaunching "FM1"/"AGX," while the Strait of Hormuz remains de facto closed.

Intra-Asia: Port congestion is absorbing capacity while carriers add loops. Wan Hai reinstated "TPS" and SITC launched Shanghai-Nagoya "SKT8." Tonnage in the 2,700-2,900 TEU range is scarce, keeping the trade well utilized, but competitive.

Latin America/ECSA: Carriers are reshuffling capacity. Hapag-Lloyd dropped "AS2" for a new "ASX" Asia-ECSA loop in April and launches "AMX" Asia-Mexico in January. ZIM has ended its U.S. Gulf–ECSA "ZGT" service and is now partnering with Hapag-Lloyd on "AS3."

Mediterranean and Black Sea: Carriers are revising capacity as Suez Canal returns reshuffle Mediterranean calls. Premier Alliance restored Tangier Med on "FE3," X-Press added a second Morocco-Spain "IMX" loop, and Samskip launched a Morocco-Iberia-North Europe shuttle.

Transatlantic (Europe-North America): Scarctiy for small and mid-size tonnage persists, with charter rates at four-year highs, keeping capacity constrained. MSC added Jacksonville to its Ecuador-U.S. loop and CMA CGM paused the North Europe-USEC leg of "PAD" for the winter.

Transpacific (Asia-North America): Supply remains tight and the U.S. Trade Representative proposed extending the Chinese ship-fee suspension to Jan. 9. Matson expects rates will remain high into 2027. Maersk exited slots on APL's "EX1" and MSC added Busan to "Pearl."

	Available space; quick booking turn time.
	Capacity well utilized; some space available.
	Demand higher than supply; space agreements challenged.

Trade Lane	Status
Transpacific to U.S. East Coast	
Transpacific to U.S. West Coast	
Intra-North Europe	
Intra-Asia	
Latin America / ECSA	
Red Sea / Suez Transit	
China to Red Sea	
Persian Gulf / Strait of Hormuz	

Trade Lane	Status
Far East to Middle East / Red Sea	
Far East to Indian Subcontinent	
Europe to North America (Transatlantic)	
North America to Europe	
U.S. Gulf Coast to North Europe	
Asia to Australia	
Africa / Indian Ocean	
Mediterranean / Black Sea	

Ocean Carrier Updates

CMA CGM: The only major carrier never to stop crossing the Red Sea, running eight Suez Canal-routed services (about 1.30 MTEU) with naval escorts. A drone was shot down near the CMA CGM CHAMPS ELYSEES. Reportedly signed more megamax orders. The carrier will pause the North Europe–USEC leg of "PAD" for winter and extend "Euromar" to Thamesport.

Evergreen: Made its first Suez Canal transit with EVER EON, with eight ad hoc Suez/Bab-el-Mandeb transits planned along with four "OGRD" Far East-Red Sea sailings. The carrier took delivery of the 16,556 TEU EVER EDIFY. COSCO Group has six Ocean Alliance loops back in service via the Suez Canal (1.27 MTEU) and, with OOCL, added Lyttelton to "ANE/ANS."

Gemini partners Maersk and Hapag-Lloyd: Nine Far East–Europe loops are running via the Suez Canal (1.76 MTEU) and Jeddah has been added to a North Europe–India loop. Hapag-Lloyd will launch "AMX" (Asia–Mexico) in January and "ASX" (Asia–ECSA) in April as it exits "AS2." Analysts expect Maersk to place new megamax orders soon.

HMM: Ordered eight 13,000 TEU LNG dual-fuel ships at HD Hyundai, lifting its orderbook to 44 ships/325,000 TEUs. Tangier Med was added to "FE3."

Maersk: Third-quarter liner EBIT increased to $2.6 billion (rates up 46% to $1,643 per TEU) and 2026 EBIT guidance was raised to $8 billion-$8.5 billion, citing Asian port congestion that absorbed capacity (utilization 96%). The carrier stopped slotting on APL's "EX1" and, with Hapag-Lloyd, relaunched the Far East-Middle East "FM1"/"AGX" loop via Khor Fakkan.

MSC: Reportedly negotiating 10 more 24,000 TEU LNG megamax ships at Hengli plus 10 upgrades, which would add up to a 3+ MTEU orderbook. Suez Canal transits resumed via 11 loops. The carrier also added Busan to "Pearl" plus Jacksonville and St. Petersburg to its Ecuador–U.S. loop. The 1,368 TEU MARTI WIND was purchased and, in a pending deal with Rheinmetall, Romania's Mangalia shipyard will be acquired for €138 million.

ONE: Reported third-quarter operating profit of $1.4 billion (up 382%) on revenue of $6.3 billion and more than doubled its full-year net profit forecast to $2 billion, despite expecting spot rates to ease in the second half. Premier Alliance is moving "MD1" and "MS2/MP2" to the Suez Canal, and Seaspan delivered the 13,580 TEU OOCL ECUADOR.

Regional/Feeder: RCL's third-quarter net profit rose about 40% to $98 million, and it ordered 12 ships. Boluda is buying Samskip (32 vessels, 18 routes; expected close on Jan. 1, 2027), X-Press Feeders placed orders for four Suezmax tankers and launched a second "IMX" loop. Wan Hai reinstated its "TPS" shuttle.

ZIM: Ended its U.S. Gulf–CSA "ZGT" service and has fixed 3,200 TEU newbuilds (four on five-year charters). The carrier is just one of two in the top 10 still routing around the Cape of Good Hope as of mid-October.

Ocean Invoice Guidance

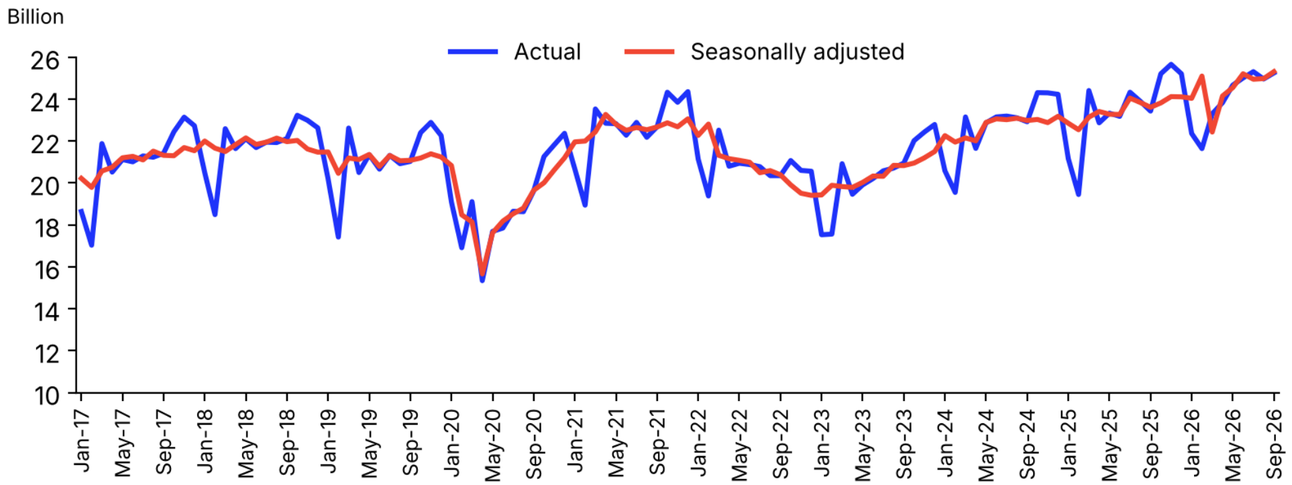
Invoice line	Where it stands (18 Nov 2026)	What to expect and ask your rep
BAF/emergency fuel surcharge	Brent was about $94/barrel Nov. 12, still well above pre-crisis levels. Emergency fuel surcharges started in March (CMA CGM $150, then $265 per TEU; Hapag-Lloyd $160 per TEU) and ran $200-500 per container by May. November levels not available at time of publication.	Inquired with each carrier for current BAF or fuel surcharges and the date of the next reset.
War-risk/emergency conflict surcharge	Announced on Mar. 2 for Persian Gulf-linked lanes: Hapag-Lloyd $1,500 per TEU; CMA CGM $2,000 per 20' and $3,000 per 40'; Maersk $1,800 and $3,000; MSC $2,000 and $3,000. The Strait of Hormuz remains disrupted, so assume fees remain in effect unless the carrier has withdrawn them.	These apply to Persian Gulf, Red Sea and nearby routings *only*. Confirm the current tariff by carrier and lane.
Strait of Hormuz/Persian Gulf routing and congestion	Persian Gulf cargo is moving through West India transshipment, Oman and UAE feeders, and Jeddah. Some UAE ports experience 7-10 day waits, and Shanghai to Jebel Ali jumped from less than $2,000 to over $8,000 per container by May. Current Gulf rates are unconfirmed.	Expect feeder, inland or congestion add-ons and longer transits on Persian Gulf-bound cargo.
EU ETS carbon surcharge	For 2026, 100% of emissions are covered (40% in 2024, 70% in 2025); note, methane and N_2O now count. Voyages into or out of the EU count at 50%; trips within the EU and time at berth count at 100%. Allowances traded around €87-90 a tonne Nov. 6-13. One estimate is about $168 per 40' from Asia to North Europe, versus $95-120 in 2025.	Ask each carrier if your company is on fixed, quarterly or allowance-indexed rates. Applicable for cargo to/from EU/EEA ports and moves with the allowance price.
Fuel EU Maritime	Ships are required to cut the greenhouse-gas intensity of their energy 2% below a 91.16 gCO2e/MJ baseline (6% from 2030). The penalty is €2,400 per tonne of fuel-equivalent shortfall. Be aware that carriers may bill it as its own line, separate from ETS. No per-TEU rate has been published.	Watch for this as a new line or bundled into an 'emissions' charge. Ask whether it is combined with ETS and how it is calculated.
Peak season/GRI/Panama	Peak season surcharges on named-account contracts run through November, and Panama Canal surcharges are billed separately. Recent transatlantic GRI/FAK increases have not held.	Watch for rate increases on Dec. 1 and Jan. 1. Transatlantic rates should drop.
Cape of Good Hope/Suez Canal routing	Going around the Cape of Good Hope added roughly $1,000-2,000 per TEU on Asia-Europe and Asia-U.S. East Coast routes in 2026. Maersk and Hapag-Lloyd have set Suez Canal return dates for AE1-AE3 between Dec. 4 and Jan. 14. DHL expects the full switch to take 6-12 months.	Routing add-ons may ease as loops return to the Suez Canal, but no carrier has said it will drop them. Be sure to inquire.

These surcharge amounts are carrier announcements reported in the trade press, not current tariffs. ETS and FuelEU details come from secondary sources because the EU Commission page was not accessible.

Air Freight Overview

- Global air cargo demand accelerated in September as industry CTK rose 7.7% YoY (4.4% in August) and international traffic gained 8.6%, with Asia-North America up by double digits for the fifth straight month.
- Capacity grew 2.7% (ACTK), led by Asia-Pacific and Middle East carriers, as faster demand lifted the global load factor 2.2 points to 47.9%. North American carriers gained 4.3 points.
- Jet fuel averaged $184.5 per barrel (up 17.5% MoM and 103.4% YoY) on Persian Gulf disruption, while cargo yields rose 2.0% MoM and held 25.9% above last year.
- Europe-Asia accelerated to 6.0% and Europe-North America to 9.3%, though the EU's 3-euro duty still tempers e-commerce; PMI export orders hit a five-year high.



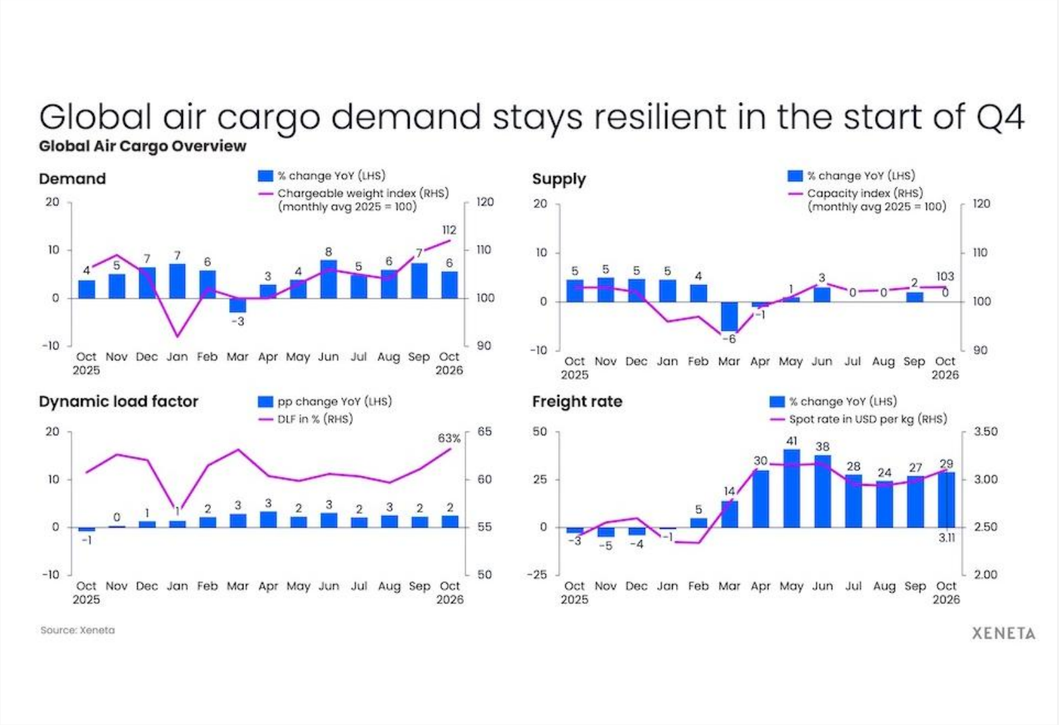


	World share, %	September 2026 (year-on-year, %) CTK	ACTK	CLF (%-pt)	CLF (level)	September 2026 (year-to-date, %) CTK	ACTK	CLF (%-pt)	CLF (level)
TOTAL MARKET	**100.0**	**7.7**	**2.7**	**2.2**	**47.9**	**5.0**	**1.7**	**1.5**	**46.5**
Africa	2.1	4.7	-1.2	2.7	47.0	6.5	-0.4	2.9	45.5
Asia Pacific	35.8	8.6	4.9	1.7	50.7	7.6	4.8	1.2	48.2
Europe	21.4	4.5	-1.6	3.2	54.6	5.4	2.6	1.4	53.9
Latin America and Caribbean	2.9	6.7	7.6	-0.3	34.3	1.7	4.8	-1.1	34.7
Middle East	13.2	3.8	7.0	-1.4	44.0	-5.3	-5.5	0.1	44.7
North America	24.6	11.8	0.8	4.3	43.9	6.5	0.4	2.4	41.9
International	**87.9**	**8.6**	**3.3**	**2.6**	**52.9**	**5.5**	**2.1**	**1.7**	**51.9**
Africa	2.1	4.7	-0.9	2.6	48.2	6.5	-0.4	3.1	47.0
Asia Pacific	32.1	10.0	5.8	2.2	56.9	8.5	6.0	1.3	54.8
Europe	21.0	4.6	-3.7	4.6	58.3	5.6	1.6	2.2	56.9
Latin America and Caribbean	2.5	6.6	7.1	-0.2	39.1	2.2	4.3	-0.8	39.3
Middle East	13.2	3.9	7.2	-1.4	44.2	-5.3	-5.5	0.1	45.0
North America	17.1	15.3	3.6	5.2	51.1	8.3	2.3	2.8	49.5

Note 1: % of industry CTK in 2025
Note 2: the total industry and regional growth rates are based on a constant sample of airlines combining reported data and estimates for missing observations. Airline traffic is allocated according to the region in which the carrier is registered; it should not be considered as regional traffic. Historical statistics are subject to revision.

Air Freight Demand | Load Factor | Rate Development

- Air cargo volumes rose 6% YoY in October, following increases of 7% in September and 6% in August — seven straight months of growth — with the chargeable weight index at 112 (2025 monthly average = 100).
- Capacity was flat YoY in October (index 103), with faster demand growth lifting the dynamic load factor by two points to 63%, the highest in the rolling 13-month view.
- Global spot rates averaged 29% above a year ago (27% in September) as carriers declined to add capacity and fuel remained costly. The TAC Index shows rates at a 2026 high (up 28.2% YoY); analysts do not expect an extra holiday season surge.
- Transpacific rates continue to climb in response to AI-related demand. Southeast Asia-North America rose 3% MoM and Northeast Asia-North America rose 4%, while TAC reports Hong Kong-North America rates were up 34% YoY in October.
- Asia-Europe e-commerce volumes fell 61% YoY in the third quarter and overall China-Europe exports were down 29% after the EU's 3-euro per-item duty went into effect. With Suez Canal container capacity back to about half of pre-crisis levels, Xeneta expect some air volume to shift back to ocean.



Air Trade Lanes

Overall: Transpacific strength carries the market into peak season, though analysts do not expect a holiday surge. Jet fuel priced at $184.5 per barrel is adding cost.

Asia-North America: The strongest major trade lane, up 17.0% YoY, a fifth straight double-digit month, with rates above $6 per kilogram from Southeast Asia and from Northeast Asia.

China/Hong Kong–Europe (e-commerce): Volumes fell 61% YoY in the third quarter (China-Europe exports down 29%) after the EU's €3 duty went into effect; an additional €2 handling charge was implemented on Nov. 1.

Europe-Asia: Growth accelerated to 6.0% YoY (3.1% in August) but remains below the double-digit pace from earlier in the year. Northeast Asia–Europe rates rose 4% as direct freighter capacity fell again.

Europe-North America: Transatlantic growth jumped to 9.3% YoY, and westbound spot rates rose 10% MoM as tighter capacity feeds into recent forwarder tenders.

Middle East-linked lanes: Middle East–Asia fell 10.2% and Europe–Middle East dropped 18.0%, the seventh straight month of decline.

Note: Asia Pacific and Middle East carriers supplied 59.6% and 34.9% of the growth. European carriers cut ACTK 1.6%, lifting load factor by 3.2 points to 54.6%.

	Available space; quick booking turn time.
	Capacity well utilized; some space available.
	Demand higher than supply; space agreements challenged.

Trade Lane	Status
AP to U.S.	
U.S. to AP	
Europe to AP	
AP to Europe	
Europe to U.S.	
U.S. to Europe	

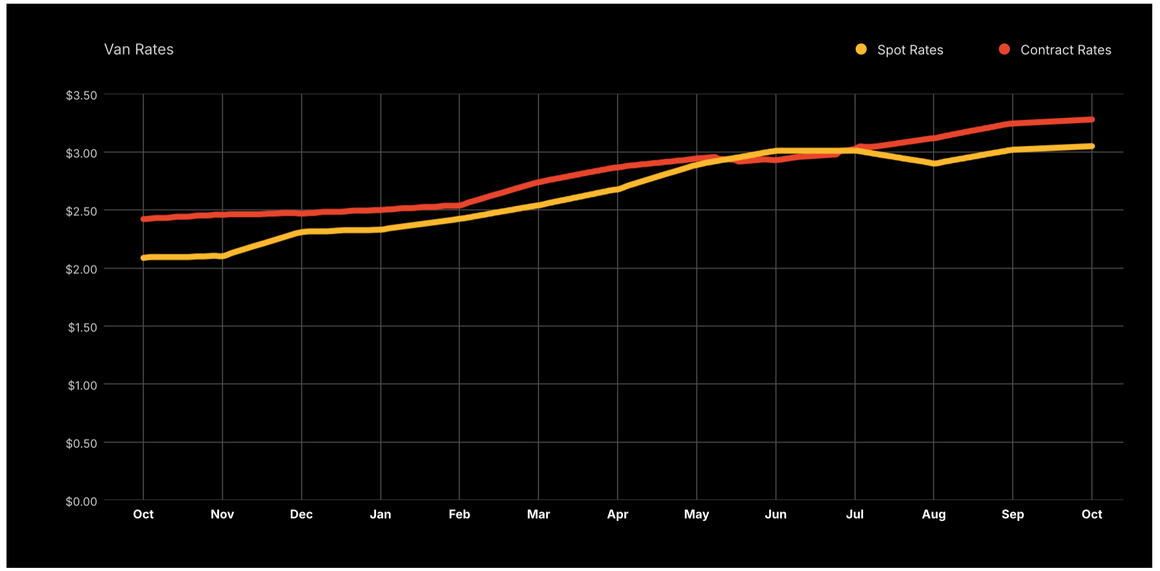
Trade Lane	Status
U.S. to LATAM	
LATAM to U.S.	
Europe to LATAM	
LATAM to Europe	
India to U.S.	
U.S. to India	

North American Transportation

- Truckload capacity remains structurally tight. Posts are down 24-34%, but load posts are up 22-47%, lifting the load-to-truck ratio to 10.9.
- Van spot rates rose to $3.05 a mile in October but remain below the $3.28 contract rate, which matches the May 2022 record.
- Diesel averaged about $6.25 per gallon in October but fell to $6.13 by Nov. 10; fuel represents 27% of the all-in van rate.
- Flatbed and reefer contract rates set monthly records again. October flatbed and van volume slipped 1% but rose 1% for reefer.
- TRAFFIX expects 2027 rates up 5% to 8%. DAT forecasts van linehaul rising by mid-Dec.

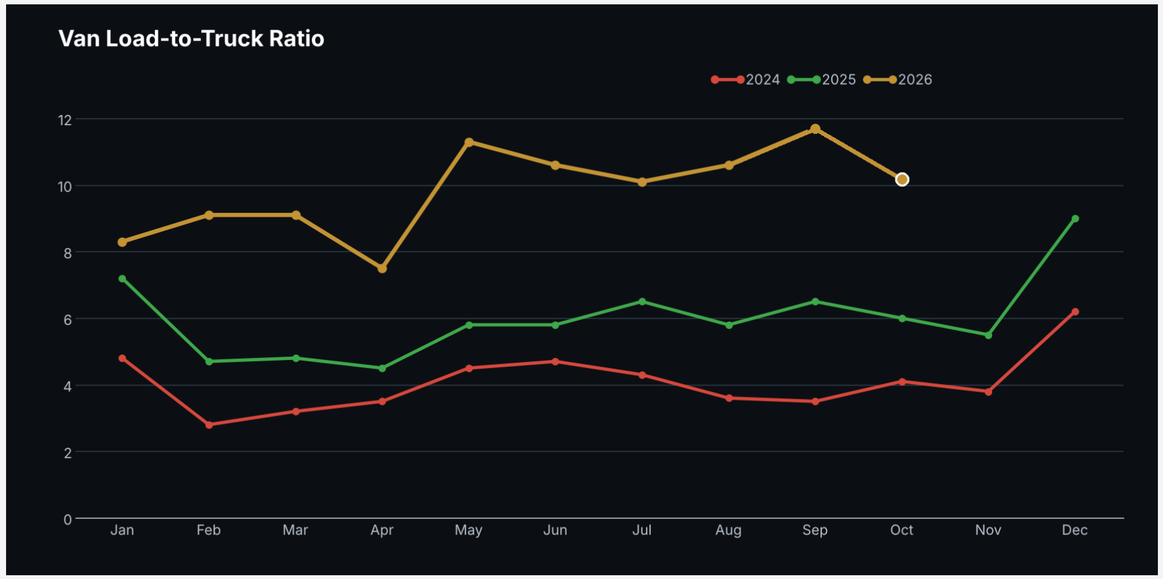


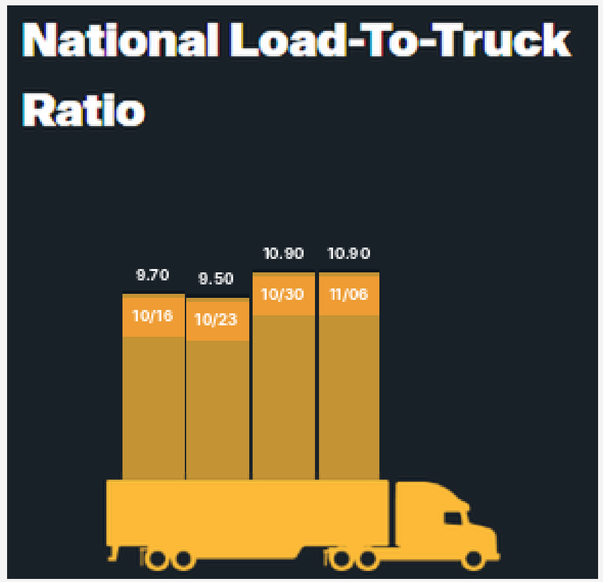




North American Transportation

- **Outlook**: Shippers should expect van spot rates to continue climbing into mid-December with a crest near January, followed by modest easing in Q1. Contract rates are forecast to run about 18% to 22% more than a year ago. Expect diesel surcharges to remain elevated into 2027.
- **Midwest:** Great Lakes and Ohio River are the highest-priced van origins, while the Upper Midwest leads as holiday food freight builds in Q4.
- **Northeast:** Upper Atlantic van rates eased slightly, while lower Atlantic rates increased. East Coast diesel slipped to $5.92 per gallon.
- **South and Gulf Coast:** Van origins eased in the Carolinas and Southeast with the lowest cost in Florida–South Georgia. Regional diesel is the lowest in the United States at $5.74 per gallon.
- **West Coast:** California is the highest-priced van origin. Regional diesel at $7.11 per gallon keeps all-in costs elevated.







US-Mexico Cross-Border Trucking

Volume

Trade between the U.S. and Mexico hit $96 billion in September (+34.2% YoY). Trucks carried 78%, with Laredo the busiest gateway, handling $38.1 billion. Mexican exports to the U.S. rose 13% in the first half, led by electronics.

Laredo Saturday pilot

Since Sept. 5, the World Trade Bridge has processed trucks on Saturdays from 8 am to 7 pm, and U.S. Customs and Border Protection expects to extend the pilot 90 days when it ends in early December. Saturday crossings are up 400-500 and Sundays are down 300-400: traffic is shifting rather than growing. The bridge now has 19 primary lanes.

Capacity

The U.S. has reportedly pulled visas from about 25,000 Mexican drivers and Mexico is short 90,000+ drivers. TRAFFIX's October index reads 54 for Mexico (above 50 means tight). A September 9-14 restriction on empty trucks crossings in Eagle Pass, Texas and Brownsville, Texas cut daily transits from about 1,000 to 300-400.

Rates

Carriers are handing back contract freight because agreed-upon rates no longer cover costs, pushing shippers to the spot market. Some Canadian corridors increased 25-35% in a month or so. TRAFFIX expects tight capacity through 2026 and into 2027, and 8-9% financing is limiting new trucks.

CANACAR stoppage

CANACAR (Cámara Nacional del Autotransporte de Carga) is Mexico's National Chamber of Freight Transport. It is the officially recognized business chamber for the country's trucking industry, representing carriers' interests and advising the government on the sector.

On Oct. 26, CANACAR called an indefinite nationwide freight stoppage, a coordinated freight movement stoppage that began at hubs around Mexico City and was intended to spread to 19 states. The group demands action on highway crime (1,105 cargo truck robberies and 15 drivers killed through September) and a reversal of proposed 2027 cuts to trucker tax incentives. The stoppage put about 1.6 million tons of daily freight at risk, including perishables and auto parts bound for the U.S. Most associations agreed to talks with the government.

Advice for shippers

Lock in dedicated or contract capacity on Laredo lanes before Q1, use the Saturday window to spread out pickups, build in extra days around any border enforcement or stoppage news, and keep a spot-market budget to hedge against contract carriers handing freight back.

What to watch

The early-December decision on the Laredo pilot and any further word on the CANACAR stoppage are the two near-term items that could affect capacity.

Cross-Border: Regulatory and Intermodal

Cabotage and B-1 visas
The U.S. Department of Transportation and Customs and Border Protection (CBP) now tie cabotage reports to visa status, and B-1 visas do not allow hauling domestic freight. Industry leaders warn that inconsistent enforcement could cause delays and shrink the driver pool, and CANACAR says tighter border enforcement adds operational complexity.

FMCSA rules
Since April, a driver whose trip goes beyond the border commercial zones can be put out of service for failing the English-proficiency test. FTR says about 70% of those violations occur in border zones. A February rulemaking also restricts non-domiciled CDLs.

Tariffs
The U.S. charges 25% on automobiles and 50% on steel and aluminum imported from Mexico. Despite optimistic statements from the U.S. executive branch, there is no text, schedule or signing date for a new tariff deal.

USMCA
Because the U.S. declined a 16-year extension, the agreement is now subject to annual review. Public comments are due Jan. 12, and the next joint review is due July 1. Auto lanes require lane-by-lane monitoring until terms are clear.

Border processes
Carta Porte paperwork, inconsistent customs brokerage, inspections and missed appointments all reduce the number of turns a carrier can make. CBP's Electronic Export Manifest pilot, scheduled to end Oct. 23, encouraged Mexican carriers to join.

Intermodal and rail
Rail carried $8.3 billion of Mexico trade in September, with crossings at Laredo, Eagle Pass and Brownsville (all in Texas). Rail is stretched across North America: U.S. port rail dwell time averages 8-13 days (Miami 13, Long Beach 11, Los Angeles 10), and Vancouver and Prince Rupert report capacity constraints.

Advice for shippers
Use carriers with clean compliance records and request confirmation of drivers' visas and English-proficiency status. Also make sure Carta Porte and customs paperwork is complete before pickup, and budget Q1 for both a tariff deal and no deal.

With lengthy rail dwell times at U.S. ports, don’t assume that rail can ease tight trucking capacity. Inquire about rail or transloading options on a lane-by-lane basis.

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