



## Data Driven Information: The Road Ahead

- *Current throughput and expectations*
- *Leading Factors and Drivers*
- *Pricing Impact*
- *Forecasting through peak and end of 2025*



## VOLUMES AND SAILINGS ASIA-USWC

### For Port Of Los Angeles:

- ZX2 (ZIM) service resumed at Trapac last week on 6/11 with the vessel COLORADO after 6 weeks of blanked sailings.
- AAS2/PRX (Ocean Alliance) service returns to FMS after 7 weeks of blanked sailings with the CMA CGM MEDEA ETA 6/27/25.
- AAC2/CPS (OCEAN ALLIANCE) service returns to APMT after 4 weeks of blanked sailings and 4 weeks of alternate weekly sailings back to full weekly schedule with the EVER LADEN ETA 7/01/25.

	Loaded Imports	Empty Imports	Total Imports	Loaded Exports	Empty Exports	Total Exports	Total TEUs	Prior Year Change
May	355,950.25	413.60	356,363.85	120,196.00	240,058.75	360,254.75	716,618.60	-4.82



## VOLUMES ASIA-USWC

**Port Of Long Beach:** total volume for May came in at 639,140 TEUs

**TOTAL YOY decrease of 8.2%**

**(better than originally *an anticipated drop of 25-30%*)**

- **Laden Imports down 13.40% YOY**
- **Laden Exports down 18.60% YOY**
- **Empty containers inbound increased 11.0% YOY**
- **Empty containers outbound increased 2.8% YOY**
- **Month-over-Month decrease (from April to May) is a decrease of 26.30%.**
- **June we are expecting 700K TEUs with most of the surge expected in July—pushing volume up to 900K TEUs.**



## INCREASED SAILING ASIA-USWC

### ➤ Port Of Long Beach:

- SEA3/PSX (COSCO/OOCL) service to LBCT returns tonight/2nd shift with OOCL UTAH after 6 weeks of blank sailings.
- AWC2 (TS Lines) service returns to PCT returns after 9 weeks of blanked sailings with TS VANCOUVER ETA
- AAC4/PCC1 (Ocean Alliance) service returns to LBCT after 8 weeks of alternate weekly sailings back to full weekly schedule with COSCO BELGIUM ETA 6/27.
- Orient (MSC) service returns to TTI after 6 weeks of blanked sailings with the MSC TIANSHAN ETA into TTI 6/26/25.

### ➤ 2 x additional new services starting soon at POLB as well:

- PS-5 (Premier Alliance) into ITS-Pier G with first vessel YM MOBILITY ETA 6/25 port rotations: Qingdao--Ningbo--Long Beach (ITS)--Oakland (TraPac)--Kobe—Qingdao
- TP9/WC6 (Maersk/HPL—Gemini Cooperation) into LBCT with the first vessel Rhone Maersk ETA 7/12/25 port rotations: Xiamen—Busan--Long Beach (LBCT)—Xiamen

# Transportation Market Trends

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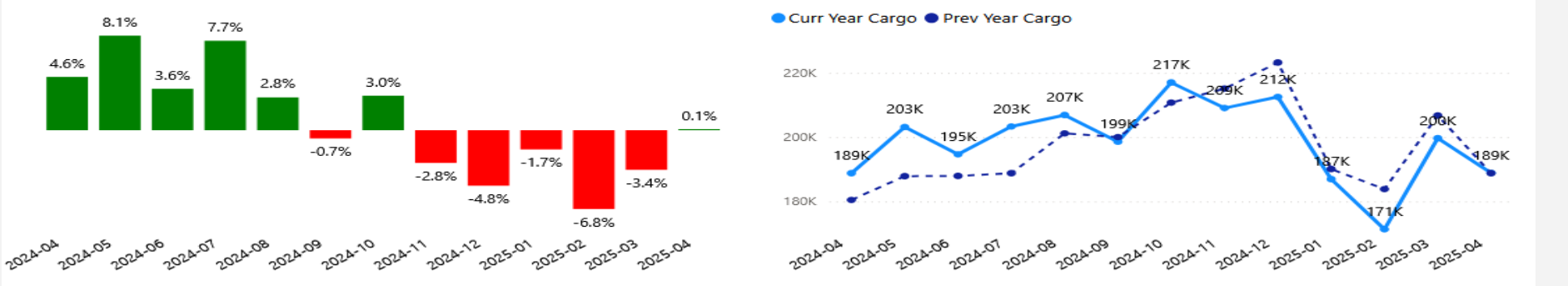
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## PORT of NEW YORK

### Port Volumes:

MONTH	IMPORT		EXPORT		TOTAL		YTD Total
	Loads	Empties	Loads	Empties	Loads	Empties	
April 2025	1,504,068	5,696	462,777	982,372	1,966,845	988,068	2,954,913
Change	9.1%		3.7%		7.8%	11.4%	9%

### Airfreight Volumes:





## LEADING FACTORS

### Front-Loading & Demand Surges

**Impact:** Shippers rushed to import goods ahead of tariff deadlines (like the 90-day pause ending August 2025).

**Effects:**

- Port congestion in Asia and U.S. (esp. Long Beach, NY/NJ).
- Container shortages, particularly outbound/export containers in inland U.S.
- We may see a strain on drayage and warehousing due to overcapacity.
- Continue to see blank sailings and equipment imbalances

**Impact:** Ocean carriers canceled sailings to match fluctuating demand or avoid unprofitable trips.

**Effects:**

- Reduced predictability/reliability in schedules.
- Disrupted supply planning for importers and exporters.
- Container imbalances, especially in U.S. Midwest and Gulf regions could lead to shorages.



## Drivers and Dynamics

- ***Tariff uncertainty:*** The 90-day tariff pause (May 12–Aug 10) has led shippers to front-load orders and inventory, creating surges to clear customs prior to August
- ***Port congestion:*** Asian and European terminals are congested because of increased volume prior to the August deadline; this could cause U.S. export container shortages to loom in July/August as inbound volume declines
- ***Capacity adjustments:*** Carriers are strategically blanking sailings and rerouting assets due to trade shifts & potential port fees

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## EXPECTATIONS

### **Rate Volatility**

**Impact:** Spot rates may continue to spike dramatically due to space shortages.

**Side effects:**

- **Contracts became harder to enforce as carriers prioritized premium-rate bookings.**
- **Shippers will face continued uncertainty and need back up procurement plans.**
- **Overall logistics cost increases across the board.**

### **Supplier Diversification & Route Shifts**

**Impact:** To avoid tariffs, companies have sought alternative sourcing (e.g., Vietnam, India, Mexico).

**Side effects:**

- **Increased transshipment and longer lead times as new routes were established.**
- **New demand pressures on non-traditional ports and inland logistics hubs.**

### **Inventory Strategy Shifts**

**Impact:** Companies adjusted their safety stock and ordering cadence to manage risk.

**Side effects:**

- **Movement from just-in-time (JIT) to just-in-case (JIC) inventory strategies.**
- **Increased warehouse demand and leasing costs.**
- **More capital tied up in inventory.**





## PRICING EXPECTATIONS

- **Spot rate for loaded boxes departing Yantian, China for Los Angeles was up 9% as of June 10. The rate from Ningbo, China increased nearly 12% during the same period. Overall, rates are up over 150% from the first week of May to the week of June 13<sup>th</sup>**
- **The Freightos Index for the week ending June 13 including GRIs saw rates more than double since the first of May as well. Prices to the U.S. East Coast experienced a 11% increase in the most recent week and are expected to continue.**
- **Carriers are preparing for further trans-Pacific GRIs, ranging between \$1,000 and \$3,000 per FEU, scheduled for mid-June and July 1.**



## SPOT MARKET TRENDS

- **Drewry WCI: as of June 17 rates are up approximately 59% over the previous four weeks**
- **Transpacific spot rates:**
  - **Shanghai to NY: +67% over four weeks**
  - **Shanghai to LA: +89% in four weeks**
- **Asia to US West/East Coast average spot:**
  - **Was flat in mid-April**
  - **Recently shifted to a higher spot tier based on market demand**
- **Short-term spikes from recent lows:**
  - **\$3k to 3.5k recently in select lanes**
  - **Possible increase to \$6k up to \$7.5k (West/East Coast) through July.**

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## Forecasting

### July

- Transpacific volume strong due to tariff window, but capacity remains tight.
- Spot rates hold elevated; expect spikes as bookings surge and space tightens.
- Congestion at ports likely to persist into July, restraining volume flow.

### Late Q3:

- Tariff pause ends (Aug 10) → front-loading expires → slowdown in booking cadence from the end of July. This could change based on completion of trade agreement.
- U.S. export container shortages likely, particularly inland rail ramps and Gulf ports.
- Possible impacts on bonded warehouse facilities beginning in August.

### Q4:

- Rate stabilization likely—carriers may reintroduce blank sailings to support pricing.
- Volume expected to dip: S&P sees U.S. import decline of 0.7% in 2025
- Capacity may rebalance, but volatility remains due to policy unknowns.