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FEB 2026

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*Supply Chain &
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February reflects tightening execution conditions across ocean freight, evolving air cargo capacity dynamics, and renewed trade policy signalling. Market behaviour around Chinese New Year, strategic logistics partnerships, and potential tariff actions are collectively shaping planning risk, capacity deployment, and compliance strategy.

EXECUTIVE TAKEAWAYS

Capacity Management Is Driving Volatility

Blank sailings and fleet constraints are tightening effective capacity across Trans-Pacific lanes, increasing rollover exposure and execution risk.



Supply Chain Visibility & Control Are Strategic Priorities

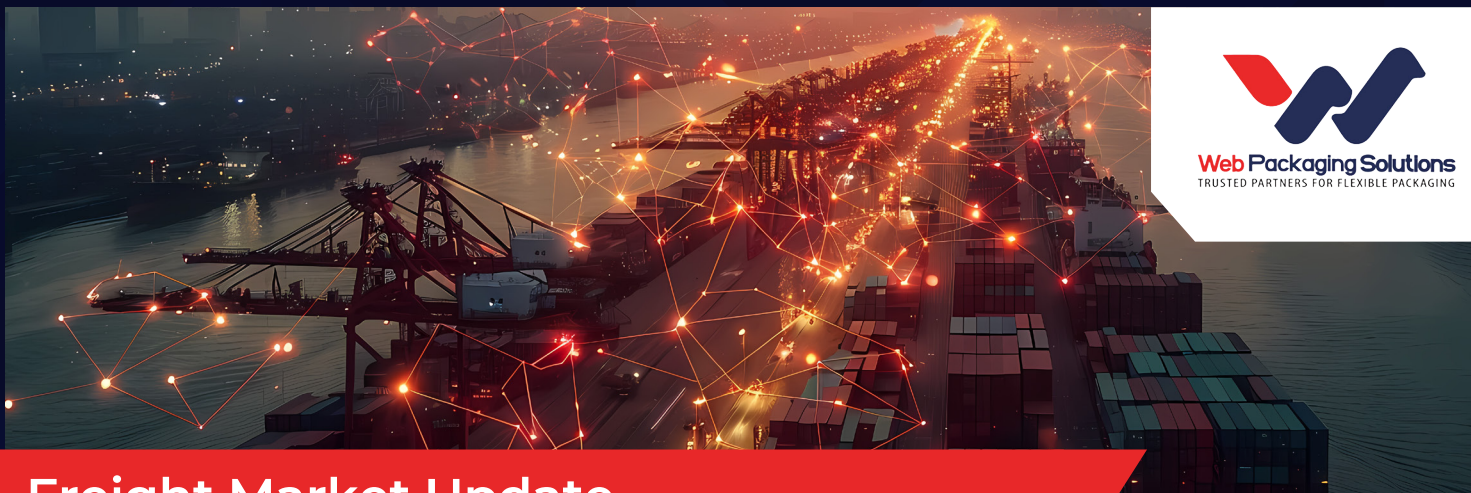
Embedded control towers, digital transport systems, and end-to-end flow management are becoming central to managing global complexity.



Trade Policy Signals Are Increasing Planning Uncertainty

Potential tariff actions and expanding FTA networks are reinforcing the importance of compliance discipline and diversified market access.





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Freight Market Update | Week 7 | 2026

WHY IT MATTERS

Artificial capacity tightening, congestion pressure, and fleet constraints are increasing execution risk across both ocean and air markets during the Chinese New Year window.

HIGHLIGHTS

Trans-Pacific Ocean Capacity Tightening

- ◆ **Uneven demand** across Asia–U.S. trade lanes during the Chinese New Year (CNY) period.
- ◆ Carriers initiated aggressive capacity withdrawals in **Week 07**, with blank sailings peaking in **Week 09**.
- ◆ Forecast blank sailings:
 - PSW: 17 blanks → **60%** effective capacity reduction
 - PNW: 7 blanks → **58%** reduction
 - USEC: 9 blanks → **50%** reduction
- ◆ Result: Rapid space tightening and fewer weekly sailing options.

Severe Rolling & Port Congestion

- ◆ Rolling exposure described as severe, with shipments vulnerable to roll or double-roll.
- ◆ Capacity released around CNY remains unstable.
- ◆ Gradual improvement expected once February factory orders are completed and China factories begin holiday shutdowns.
- ◆ Port conditions:
 - 2–4 day berth waiting at **major China gateways**
 - **Elevated yard** utilization in Southeast Asia
 - Feeder reliability impacted



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Air Cargo Market – Soft Through CNY

- ◆ **U.S.–China air cargo** entered CNY period in Week 07 (starting Feb 9).
- ◆ Demand expected to remain **subdued during the holiday window**.
- ◆ **2026 outlook:** Air capacity projected to grow faster than demand in several regions.

Network Constraints

- ◆ Fleet and schedule shifts **affecting reliability**.
- ◆ **MD-11** availability constraints impacting **UPS** and **FedEx**.
- ◆ Wide cancellations on **China–Japan routes**.

Regional Air Demand Trends

- ◆ **Hong Kong:** Soft demand ahead of CNY.
- ◆ **Southeast Asia:** More stable demand supported by high-tech, e-commerce, fashion, and electronics.
- ◆ **Singapore:** Year-over-year tonnage growth driven by pre-shipments and new freighter services.

LESSONS & ACTIONABLES

Blank sailings, congestion, and fleet constraints require tighter shipment planning, flexible routing strategies, and proactive booking discipline to mitigate rollover and reliability risk.



Airbus Renews Logistics Flows Contract

WHY IT MATTERS

Long-term, control-tower-driven transport partnerships are reinforcing the shift from transactional logistics management to integrated, visibility-led supply chain transformation.

HIGHLIGHTS

- ◆ **DHL Supply Chain** renewed its **Lead Transport Partnership (LTP)** with Airbus to manage global transport flows for commercial aircraft operations.
- ◆ Originally launched in 2008, the LTP now **covers air, sea, road, and parcel transport, including 24/7 Aircraft on Ground (AOG) support.**

Scope & Operations

- ◆ **~350,000** shipments managed annually across **~20 Airbus** sites worldwide.
- ◆ Coordinated from **DHL** centers of expertise in Toulouse and Valencia.
- ◆ Includes inbound supplier **flows, inter-factory movements** (Europe, USA, China), and **outbound spare parts and returns.**
- ◆ Continued responsibility for **carrier contracts, transport tenders, quality control, and claims management.**



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Innovation, Visibility & Digitalization

- ◆ **LTP control towers** in Valencia and Toulouse provide end-to-end visibility and control.
- ◆ **Emphasis on managing rising supply chain** complexity through improved visibility and service performance.
- ◆ **Nearly 20 years of collaboration** supporting scalable solutions, digital transformation, and faster order fulfillment.

Innovation, Visibility & Digitalization

- ◆ Integration of **energy efficiency** and **carbon reduction objectives**.
- ◆ Deployment of a **new transport management system**.
- ◆ Improved **planning, reduced lead times, and route/load optimization** to reduce transport-related emissions.
- ◆ Reflects shared commitment to a **resilient, intelligent, and sustainable supply chain**.

LESSONS & ACTIONABLES

End-to-end visibility, embedded transport governance, and digital control systems are becoming foundational to managing global complexity and sustaining operational performance.

White House Signals Potential Tariff Increases on South Korea and Canada Imports

WHY IT MATTERS

Policy signals around reciprocal tariffs are introducing uncertainty in trade planning, while formal regulatory guidance and enforcement mechanisms remain undefined.

HIGHLIGHTS

Overview of Announced Signals

- ◆ Remarks suggest possible new or higher tariffs on imports from **South Korea and Canada**.
- ◆ Framed around reciprocal **tariff treatment** and **trade compliance enforcement**.
- ◆ No formal actions implemented; **statements remain policy signals**.

Proposed South Korea Tariff Structure

- ◆ Tariffs on certain South Korea–origin goods could rise from **15% to 25%**.
- ◆ **Referenced categories:** automobiles, lumber, pharmaceutical products, and other goods subject to reciprocal tariff treatment.
- ◆ Linked to legislative approval status in South Korea related to **prior trade arrangements**.
- ◆ No details provided on effective dates, HTSUS classifications, exemptions, or transition periods.



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Potential Tariffs on Canada

- ◆ Comments indicate tariffs of up to **100%** on Canadian-origin goods under specific conditions.
- ◆ Focus on third-country goods potentially entering the U.S. via Canada following **Canada–China trade negotiations**.
- ◆ No clarification on targeted products or triggering thresholds.

Regulatory and Customs Status

- ◆ As of **January 27, 2026**, no official notices issued by the White House, USTR, or CBP.
- ◆ Current customs treatment remains unchanged.
- ◆ Scope, enforcement, and compliance **requirements undefined**.

LESSONS & ACTIONABLES

With no formal implementation yet, importers must closely monitor regulatory developments while maintaining compliance readiness for potential tariff adjustments.



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India–EU FTA Seen Strengthening Manufacturing on Both Sides

WHY IT MATTERS

Expanding FTA coverage is positioning manufacturing strength, export resilience, and competitive integration into global value chains as central to long-term trade performance.

HIGHLIGHTS

- ◆ **India–EU FTA** expected to deliver mutual manufacturing gains, supporting selective industrial revival in Europe while strengthening India’s competitiveness.
- ◆ For India, projected to enhance industrial efficiency, export resilience, and long-term strategic capabilities.
- ◆ Benefits depend on domestic manufacturing strength, not tariff access alone.

Sector-Specific Export Impacts

- ◆ Sharp increase in gems and jewellery exports to the UK expected following the **India–UK FTA**.
- ◆ Stronger UK performance could generate positive spillover effects across other export destinations.



India's Expanding FTA Network

- ◆ Diversification through agreements including:
 - UK (CETA)
 - Oman (CEPA)
- ◆ Ongoing negotiations with the US, Chile, and Peru.

Strategic and Competitiveness Implications

- ◆ **Broader FTA footprint** provides more stable and predictable market access amid global uncertainty.
- ◆ Trade agreements support scaling production and integration into **global value chains**.
- ◆ Greater exposure to competition expected to drive **higher productivity, quality, and reliability**.

LESSONS & ACTIONABLES

Trade agreements enhance market access, but sustainable competitiveness depends on strengthening domestic manufacturing capabilities and export efficiency.

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