

AUGUST 2026

MARKET UPDATE



JMR
J.M. RODGERS Co., Inc.



Market Overview

Transpacific ocean freight rates in August 2026 have softened from July's historic highs, but costs remain elevated due to fuel surcharges, Panama Canal restrictions, and weather disruptions in South China.

Space to the U.S. West Coast has improved. Extra loaders have improved availability, resulting in downward-trending rates.

East and Gulf Coast services remain tight due to Panama Canal draft restrictions and limited carrier deployments, so overall costs remain elevated.

Space Constraints

USWC (West Coast)

- Carriers deployed extra loaders in late July/early August, easing space pressure.
- However, rollovers remain common on high-volume lanes (Shanghai/Ningbo → Los Angeles/Long Beach).
- Premium services (guaranteed loading) are still heavily utilized, though base allocations have improved.

USEC (East Coast) & Gulf

- Space remains tight and volatile due to Panama Canal draft restrictions (reducing vessel capacity by approximately 2,000 TEU per transit).
- Carriers are prioritizing high-yield cargo and premium bookings, leaving general FAK allocations limited.
- Gulf routings (Houston, Mobile) are particularly constrained, with bookings required 3 to 4 weeks in advance.
- USEC importers face the highest risk of rollovers.

Blank Sailings

August 2026 blank sailings are heaviest on USEC services, with MSC and 2M leading cancellations. USWC services are relatively stable but are still impacted. Shippers should book early, budget for surcharges, and diversify routings.

Carrier / Alliance	Services Affected	Blank Sailings (Aug 2026)	Notes
MSC	Empire, Amberjack, Emerald (Asia USEC)	~8–10 sailings	Panama Canal surcharge introduced (USD 100/TEU). Indus Express withdrawn, tightening India–USEC space.
Maersk (Gemini/2M)	TP7, Dragon/Qilin adjustments	Selective omissions, ~4–5 sailings	Shanghai removed from Dragon rotation; typhoon disruptions caused port omissions.
CMA CGM (Ocean Alliance)	FAL/Asia–USEC strings	~6–8 sailings	Capacity discipline; USEC cancellations concentrated late August.
COSCO (Ocean Alliance)	Asia–USEC loops	~5 sailings	Ocean Alliance cancellations mid- and late August; selective USEC voids.
Ocean Alliance (CMA, COSCO, Evergreen, OOCL)	Asia–USWC & USEC	~10 sailings	Targeted voids on USEC; USWC cancellations limited.
THE Alliance (Hapag-Lloyd, ONE, Yang Ming, HMM)	Asia–USWC strings	~6–7 sailings	Adjusted rotations; cancellations on Pacific Southwest.
2M Alliance (Maersk + MSC)	Asia–USEC	~9–10 sailings	Structural withdrawals; USEC most constrained (14% capacity blanked).



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Network Update – August/September 2026

Ocean Alliance

To align with current demand, Ocean Alliance will adjust three Asia-USWC services (two PSW loops and one PNW loop) from late August through early September.

PSW Adjustments

- **COSCO AAS2 / CMA PRX / OOCL PCS1 / EMC PRX:** Port Kelang added; ISC and Xiamen removed; Haiphong transferred in.
 - **New Eastbound rotation:** Port Kelang – Laem Chabang – Haiphong – Yantian – Los Angeles
 - **First sailing:** CMA CGM LYRA, ETD Port Kelang, 25 Aug.
- **COSCO SEA2 / CMA MTE / OOCL SEAP-PSW / EMC PE1:** Port Kelang added.
 - **New Eastbound rotation:** Port Kelang – Cai Mep – Shanghai – Los Angeles – Oakland
 - **First sailing:** CMA CGM AMAZON, ETD Port Kelang, 1 Sep.

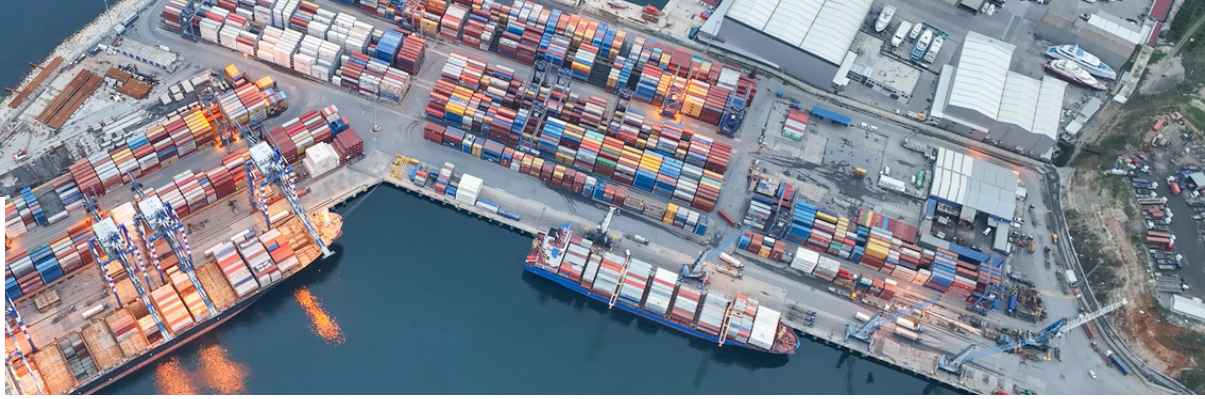
PNW Adjustments

- **COSCO MPNW / CMA CPNW / OOCL PNW2:** Yantian added; Qingdao and Ningbo removed.
 - **New Eastbound rotation:** Yantian – Shanghai – Busan – Vancouver – Seattle
 - **First sailing:** CMA CGM AMAZON, ETD Yantian, 8 Sep.

Premier Alliance

To capture demand from Central and North China, Premier Alliance will expand EC3 coverage effective Week 33.

- **New Eastbound rotation:** Tianjin – Qingdao – Busan – Ningbo – Laem Chabang – Cai Mep – Singapore – Colombo – New York – Jacksonville – Savannah – Charleston
- **First sailing:** ONE HAWK, ETD Tianjin, 8 Sep.



Due to severe congestion at Shanghai (typhoon aftermath and vessel bunching), Premier Alliance will skip Shanghai calls on PS4/EC2/EC4 services effective Week 34.

- Alternative arrangements: Shanghai cargo will be transshipped via Busan for onward connection to mother vessels on PS4/EC2/EC4.

Gemini

Gemini will add a direct Oakland call on MSK TP7 / HPL WC5 service effective Week 33, enhancing West Coast coverage.

- **New Eastbound rotation:** Yokohama – Busan – Ningbo – Los Angeles – Oakland
- **First sailing:** MAERSK KINLOSS, ETD Yokohama, 13 Aug

Air Freight Update

The Transpacific air freight market in August continues to reflect a split dynamic between Northeast Asia and Greater China. Taiwan and Korea remain extremely tight, with load factors approaching ninety percent as AI servers and semiconductor exports dominate available uplift. This high-tech demand is absorbing capacity and sustaining elevated rates, even as consumer and e-commerce volumes soften. By contrast, North China and Hong Kong are seeing more balanced conditions, with rates easing and space more accessible. South China remains stable, though typhoon disruptions have caused delays and vessel bunching that ripple into air cargo flows.

We recommend that customers pre-book shipments two to three weeks in advance for Taiwan and Korea origins and consider South China routings where pricing and space remain steadier. 



THANK YOU



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