AUGUST 2026

MARKET UPDATE

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INTRODUCTION

Welcome to Uniserve's Monthly Market Update, your concise briefing on the trends, challenges and opportunities shaping global supply chains. Designed to help cut through complexity, this report equips you to make confident, informed decisions for the months ahead.

This month's edition brings together expert insights from across GB Global group companies, highlighting key developments from ocean and air freight to environmental compliance and customs regulations.

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- US Tariffs Drive Global Supply Chain Reassessment

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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

Southern China Faces Weather-Related Disruption

Typhoon activity across Southern China has emerged as a key risk for supply chains this month, affecting major logistics and manufacturing hubs including Shenzhen, Yantian, Shekou and the wider Guangdong region. While seasonal weather disruption is not unusual, recent developments have heightened concerns around port operations, road transport and factory output.

The immediate impact is likely to be felt in trucking movements and terminal productivity, with adverse weather capable of slowing cargo flows both into and out of ports. Shipping lines may also be forced to adjust vessel schedules, creating knock-on delays that can persist long after weather conditions improve as supply chains work through accumulated backlogs.

Businesses moving cargo through Southern China should build additional flexibility into their planning, particularly for time-sensitive shipments. Close monitoring of weather alerts and operational updates from carriers and terminals will be essential throughout August, as even short-lived disruptions can quickly affect manufacturing schedules and export programmes.

Red Sea Disruption Continues to Reshape Shipping Networks

Despite some isolated vessel movements through the Suez Canal, there remains no meaningful return of Asia-Europe container services to the Red Sea route. Most carriers continue to divert vessels around the Cape of Good Hope as security concerns in the region persist.

The longer routing has become the industry's operating norm, extending transit times and increasing costs across global container networks. While supply chains have largely adapted to the change, the Red Sea remains one of the most significant geopolitical risks facing ocean freight. Any deterioration in regional stability could lead to further disruption, while a sustained improvement would be needed before carriers consider a broader return to Suez services.

For importers and exporters, the priority remains planning around longer lead times and maintaining flexibility around arrival expectations. Customers should continue to monitor carrier announcements closely, as routing decisions remain highly dependent on regional developments.

"Businesses moving cargo through Southern China should build additional flexibility into their planning, particularly for time-sensitive shipments."

Steve Ireland,
Director of Surface Freight Operations
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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

US Tariffs Drive Global Supply Chain Reassessment

Recent US tariff announcements are continuing to influence supply chain strategies well beyond North America. Although many measures target specific countries and products, the wider impact is prompting businesses to reassess sourcing locations, manufacturing footprints and inventory strategies across multiple trade lanes.

In the coming weeks, some importers may accelerate shipments ahead of tariff implementation, while others explore alternative sourcing markets to reduce future exposure. These decisions have the potential to shift freight demand between major trade corridors, creating changes in vessel utilisation and equipment availability.

For UK and European businesses, the greatest risk may come indirectly. As global manufacturers and importers respond to evolving trade policies, changes in cargo flows could affect shipping capacity, freight demand and market dynamics in regions far removed from the original tariff measures. Businesses should remain alert to both policy developments and broader market reactions as the situation continues to evolve.

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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

UK-India Trade Deal Drives Export Demand

The implementation of the UK-India Free Trade Agreement is already having an impact on freight flows, with exporters moving quickly to take advantage of newly available duty-free access into the UK market. Major export gateways including Nhava Sheva, Mundra and Chennai have reported a sharp increase in demand for UK-bound container capacity, with booking requests rising by an estimated 12-15% compared with the previous month.

The strongest growth is being seen on direct services serving key UK ports such as Felixstowe, Southampton and London Gateway. While the agreement is expected to boost bilateral trade over the longer term, the immediate effect is placing additional pressure on equipment availability and vessel space in India.

Importers and exporters should be prepared for potential bottlenecks over the coming weeks, including equipment shortages, vessel rollovers and longer customs processing times as volumes increase. Businesses with regular India-UK movements would be well advised to secure bookings earlier than usual and maintain flexibility around routing options where possible.

Ocean Carriers Push Through August Rate Increases

After a period of relative stability, major ocean carriers are implementing fresh rate increases across Asia-Europe and Indian Subcontinent-Europe trade lanes. Peak Season Surcharges and General Rate Increases introduced for August shipments have reversed the softer market conditions seen earlier in the summer.

Carriers are expected to take a firmer stance on rate enforcement throughout August, particularly on spot market bookings. The gap between long-term contract rates and spot pricing is likely to widen, creating cost pressures for shippers that remain heavily reliant on short-term procurement. Some carriers may also reduce capacity through blank sailings if demand weakens, helping to support elevated pricing levels.

For businesses importing into Europe and the UK, the key challenge will be maintaining cost predictability. Regular monitoring of carrier pricing announcements and securing capacity through a mix of contract and spot market arrangements may help reduce exposure to sudden increases.

"The implementation of the UK-India Free Trade Agreement is already having an impact on freight flows, with exporters moving quickly to take advantage of newly available duty-free access into the UK market."

Shruti Jain,
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AIR FREIGHT UPDATE

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- Middle East Conflict Puts Upward Pressure on Freight Costs
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AIR FREIGHT GLOBAL MARKET OVERVIEW

Middle East Conflict Puts Upward Pressure on Freight Costs

Renewed instability in the Middle East is once again creating uncertainty for global air freight markets. Hopes that a temporary ceasefire would ease pressure on transport networks have faded, with the return of hostilities increasing concerns around fuel costs, operational disruption and insurance premiums for carriers operating in or near the region.

While the conflict is geographically concentrated in the Middle East, its effects are being felt across global supply chains. Airlines and logistics providers are already facing rising operating costs, particularly as fuel prices come under renewed pressure. Insurance costs are also increasing for carriers exposed to the region, adding further strain to transport budgets.

As these costs filter through the supply chain, shippers should expect the return of fuel and security-related surcharges that had begun to ease earlier in the year. The result is likely to be higher transport costs for time-sensitive shipments during the months ahead.

For customers, building additional lead time into supply chains will help reduce reliance on premium services, while clear communication with customers and suppliers about potential cost increases will be important as market conditions remain volatile.

Fuel Supply Concerns Return to the Forefront

Alongside the broader geopolitical uncertainty, developments affecting key energy routes are once again drawing attention to global jet fuel availability. The breakdown of the ceasefire, combined with disruption to shipping movements through the Strait of Hormuz and attacks on energy infrastructure and crude oil shipments, has renewed concerns around fuel supply and pricing.

The impact is being felt particularly in markets that rely heavily on Middle Eastern energy exports. As supply chains adjust and inventories come under pressure, prices for refined products including diesel and jet fuel have started to move upwards again.

For the aviation sector, rising fuel costs present a direct challenge. Airlines are expected to continue passing increased operating expenses on to customers through surcharges, while some routes could face capacity adjustments if market conditions deteriorate further.

Although there is currently no indication of widespread service disruption, businesses

"While the conflict is geographically concentrated in the Middle East, its effects are being felt across global supply chains."

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AIR FREIGHT GLOBAL MARKET OVERVIEW

moving goods by air should closely monitor fuel-related surcharges and budget for the possibility of further increases as the third quarter progresses. Keeping supply chains flexible and allowing additional planning time where possible will help minimise exposure to short-notice cost changes.

Increased Air Cargo Capacity Brings Relief

Air cargo markets between India and Europe are seeing a welcome increase in available capacity, helped by expanded passenger schedules and additional freighter services. Capacity from major hubs including Delhi, Mumbai and Bengaluru has risen by more than 15%, supported by stronger UK-India trade and continued demand for faster transport options.

The additional capacity is expected to improve availability for shippers and may help moderate spot rates on some key routes. Transit times for sectors such as pharmaceuticals, garments and other time-sensitive cargo could also improve as airlines increase frequencies and network coverage.

However, strong demand continues to put pressure on airport cargo facilities, particularly during peak operating periods. Shippers should continue to pay close attention to cargo cut-off times and booking requirements to avoid disruption.

"Capacity from major hubs including Delhi, Mumbai and Bengaluru has risen by more than 15%."

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EUROPEAN LOGISTICS UPDATE

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- Service Disruption on Italian Rail Corridor

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EUROPEAN LOGISTICS MARKET OVERVIEW

Summer Holiday Traffic Affecting the France–UK Corridor

Seasonal holiday travel continues to place significant pressure on the main freight routes between France and the UK. Heavy traffic is being reported around the Port of Dover, the Port of Calais, the Eurotunnel terminals and key motorways across northern France, as large numbers of vehicles head to and from popular destinations. The busiest periods are typically Fridays and weekends, when traffic volumes increase considerably. As a result, commercial vehicles are experiencing longer waiting times, slower border crossings and extended journey durations. Transport operators are advised to plan routes carefully, allow additional transit time and monitor live traffic updates to minimise disruption.

Service Disruption on Italian Rail Corridor

Over the past few weeks, the Italian rail corridor has experienced ongoing delays and cancellations due to a combination of factors. Planned infrastructure works in Aken, Troisdorf, Basel and Luino have required trains to be diverted, resulting in congestion on alternative routes and reduced network capacity. This has led to terminal congestion in Italy, with many terminals only able to accept units on a one-in, one-out basis.

“Seasonal holiday travel continues to place significant pressure on the main freight routes between France and the UK.”

Doug Maskell,
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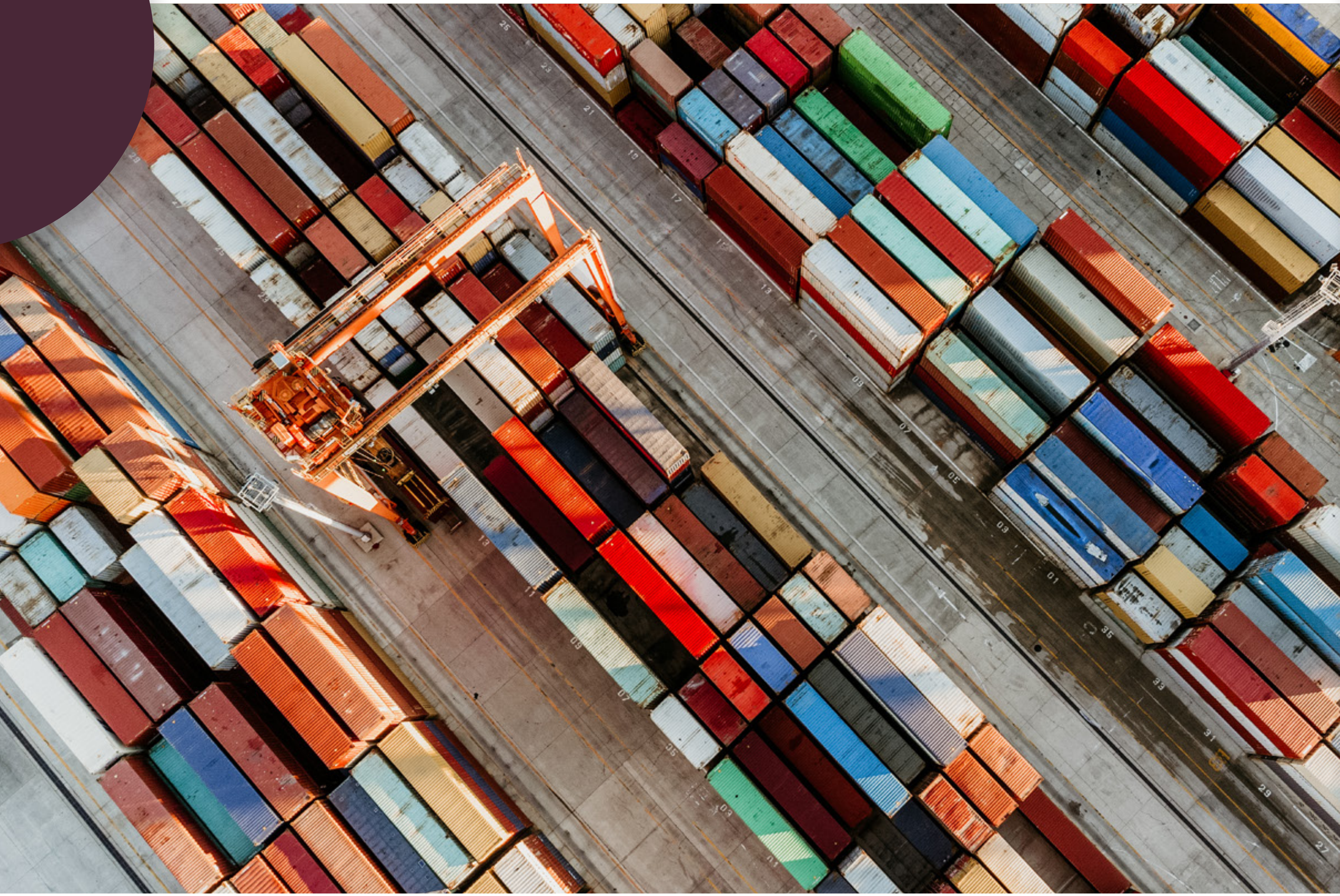
CUSTOMS UPDATE



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- EU Introduces Duty on Low-Value Imports
- New Documentation Rules for US-Origin Goods Entering the EU

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CUSTOMS MARKET OVERVIEW

UK Tightens Steel Import Controls

A major change to UK trade policy came into force on 1 July, with new measures designed to protect domestic steel production. The previous steel safeguard regime has been replaced by a stricter system that reduces tariff-free import quotas by 51%, with imports exceeding those quotas now subject to a 50% tariff. The measures apply to steel products that can be manufactured within the UK.

The move is expected to have a significant impact on importers, manufacturers and exporters that rely on steel. As businesses adapt, the market is likely to see shifts in sourcing strategies, supply chain structures and pricing. Higher import costs could increase the cost of finished goods, while reduced quota availability may make tariff-free access more difficult.

Companies trading in steel should assess their exposure to the new rules and consider whether changes to procurement, customs arrangements or supply chain design are needed. Businesses may also benefit from exploring customs special procedures that can help mitigate duty costs.

EU Introduces Duty on Low-Value Imports

The European Union has ended duty-free treatment for many low-value imports by introducing a temporary €3 flat-rate customs duty on consignments valued at up to €150. The measure took effect on 1 July and is scheduled to remain in place until July 2028, when a more permanent framework is expected to replace it.

The change primarily affects e-commerce shipments and consumer goods entering the EU from overseas markets. Businesses exporting into the bloc will need to account for the additional cost in their pricing and fulfilment strategies, while importers should expect increased scrutiny of low-value shipments from customs authorities.

Although the duty is relatively modest, the cumulative impact could affect margins for high-volume, low-value trade. Companies should ensure customs declarations remain accurate and review whether their operating models remain commercially viable under the new regime.

New Documentation Rules for US-Origin Goods Entering the EU

Businesses importing US-origin goods into the EU face new compliance requirements following a regulatory change introduced on 1 July. In addition to the standard evidence used to demonstrate non-preferential origin, importers must now

"The European Union has ended duty-free treatment for many low-value imports by introducing a temporary €3 flat-rate customs duty on consignments valued at up to €150."

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provide evidence that goods have been transported directly when seeking the application of adjusted customs duties.

The new requirement is expected to trigger increased checks by EU customs authorities, particularly where goods have travelled through third countries before reaching the European market. Failure to provide adequate documentary evidence could result in customs delays, additional duty costs and increased compliance scrutiny.

Importers should review their current documentation processes and work closely with suppliers, logistics providers and customs intermediaries to ensure the required evidence is available before shipments arrive in the EU. Early preparation will help minimise disruption as authorities begin enforcing the new rules.

“Businesses importing US-origin goods into the EU face new compliance requirements following a regulatory change introduced on 1st July.”

Toby Spink,
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ENVIRONMENTAL COMPLIANCE UPDATE

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ENVIRONMENTAL COMPLIANCE MARKET OVERVIEW

Beyondly Marks 20 Years of Environmental Action

Beyondly celebrated its upcoming 20th anniversary with two high-profile events in London, bringing together policymakers, environmental leaders and customers to reflect on progress made over the past two decades and discuss the challenges ahead.

The first event, held at the Palace of Westminster in collaboration with Net Zero Week and Wera Hobhouse MP, focused on the importance of international collaboration in addressing climate change. Discussions highlighted the reality that emissions, waste and supply chains operate across borders, making global cooperation essential. Speakers included Wera Hobhouse MP, Beyondly's Director of Policy and Public Affairs Alex Hilton, and former NASA astronaut Ron Garan, who shared his perspective on environmental responsibility from space.

The following day, customers and industry stakeholders gathered at The Savile Club to celebrate Beyondly's journey since its founding in 2006. Conversations centred on the future of environmental compliance, with speakers exploring topics ranging from sustainable packaging and Extended Producer Responsibility to the growing complexity of international regulation.

A recurring theme was the need for businesses to embed sustainability throughout their organisations while maintaining specialist expertise and robust data management.

Together, the events reinforced a clear message: meaningful environmental progress depends on collaboration, knowledge-sharing and long-term commitment. As regulatory requirements continue to evolve, businesses will need to balance compliance obligations with broader sustainability ambitions, ensuring environmental action remains integrated into strategic decision-making.

“Beyondly celebrated its upcoming 20th anniversary with two high-profile events in London, bringing together policymakers, environmental leaders and customers.”

Michael Jennings,
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EDUCATION UPDATE

supply chain academy

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SUPPLY CHAIN ACADEMY APPOINTED TO GOVERNMENT AGENCY RM6102

Supply Chain Academy Appointed to Government Apprenticeship Training Framework for Logistics

Supply Chain Academy has been appointed to the Government Commercial Agency RM6102 Apprenticeship Training Dynamic Market for Logistics, marking an important milestone in expanding access to high-quality logistics and supply chain apprenticeship programmes across the public sector.

The appointment enables government departments, defence organisations and wider public sector bodies to procure Supply Chain Academy's specialist apprenticeship training through an approved government procurement framework, making it easier to invest in workforce development and build future-ready supply chain capability.

Working in partnership with Seafast Logistics Limited as part of GB Global's Government & Defence Division, Supply Chain Academy is committed to supporting organisations with industry-led learning that develops the skills needed to strengthen operational resilience, improve performance and prepare for the future.

Our apprenticeship programmes are designed and delivered by experienced supply chain professionals who understand the challenges facing today's logistics industry. By combining practical knowledge with commercial insight and leadership development, apprentices gain the skills required to make an immediate impact in the workplace while supporting long-term organisational growth.

As supply chains continue to evolve in response to technological change, increasing complexity and global challenges, investing in people has never been more important. Through this framework appointment, Supply Chain Academy is well positioned to help government and public sector organisations develop the next generation of logistics and supply chain professionals.

We would like to thank everyone who contributed to achieving this milestone, including Jason Silver, whose support played an important role throughout the process.

If your organisation is looking to strengthen its workforce through apprenticeships, workforce development or wider supply chain capability building, we'd be delighted to discuss how we can help.

"The appointment enables government departments, defence organisations and wider public sector bodies to procure Supply Chain Academy's specialist apprenticeship training."

Alex Mortimer,
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SUPPLY CHAIN ACADEMY LAUNCHES NEW DEGREE APPRENTICESHIP

To find out more, contact the Supply Chain Academy team at **info@supplychainacademy.org.uk**.

New Degree Apprenticeship Launched to Develop the Next Generation of Digital Supply Chain Leaders

Supply Chain Academy has partnered with the University of West London to launch the BSc (Hons) Leading Digital Transformation for Sustainable Supply Chains, a Level 6 Degree Apprenticeship designed to equip professionals with the digital, leadership and sustainability skills needed for today's evolving supply chains.

As organisations respond to AI, digitalisation, sustainability demands and increasing customer expectations, the need for skilled supply chain professionals continues to grow. This programme enables both existing employees and early career professionals to earn a university degree while applying their learning directly to workplace challenges.

Delivered through a flexible hybrid model, the apprenticeship combines live online teaching, interactive workshops, workplace projects and independent study. Learners develop practical skills by tackling real business issues, helping organisations improve performance, strengthen resilience and drive digital transformation throughout the programme.

Designed for professionals across procurement, logistics, manufacturing, warehousing, transport and operations, the degree also enables eligible employers to maximise investment through the Growth & Skills Levy, making leadership development accessible for businesses of all sizes, including SMEs.

Modules include Digital Transformation, Artificial Intelligence in Supply Chains, Sustainable Supply Chain Strategy, Leadership and Change Management, Supply Chain Analytics, Operational Excellence and Strategic Project Management.

Alex Mortimer, Commercial Director at Supply Chain Academy, said: "By combining the academic excellence of the University of West London with our real-world industry expertise, we've created a degree that develops professionals who can embrace change, drive innovation and make an immediate impact in their organisations."

Makayla Whyte, CEO of Supply Chain Academy, added: "This programme creates opportunities for individuals to realise their potential, for employers to develop future

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SUPPLY CHAIN ACADEMY LAUNCHES NEW DEGREE APPRENTICESHIP

leaders and for our industry to build the talent it needs to thrive."

The first cohort begins in October, with applications now open for employers looking to strengthen leadership capability and prepare their workforce for the future.

For more information about the BSc (Hons) Leading Digital Transformation for Sustainable Supply Chains, or to discuss how the programme could support your organisation, contact Supply Chain Academy at **info@supplychainacademy.org.uk**.

"The first cohort begins in October, with applications now open for employers looking to strengthen leadership capability and prepare their workforce for the future."

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