SEPTEMBER 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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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

Successive Typhoons Create Rolling Delays Across China

Ocean supply chains out of China remain under pressure after a series of typhoons disrupted operations at key export gateways, including Shanghai, Yangshan and Ningbo. While weather-related interruptions are common during the Far East summer season, the issue this year has been the cumulative impact of multiple storms arriving before previous backlogs have been cleared. The latest disruption, caused by Typhoon Saudel, forced operational suspensions at major terminals and further delayed recovery efforts.

As terminals reopen, carriers continue to manage vessel bunching and irregular schedules, resulting in delayed departures, missed connections and longer transit times for customers shipping between Asia and Europe.

Schedule Reliability Under Further Pressure

The knock-on effects are now being felt across Asia-Europe and Asia-UK services. Carriers operating from major Chinese hubs such as Shanghai, Ningbo, Qingdao and Yantian are increasingly adjusting networks in an effort to restore schedule integrity.

This can include port omissions, changes to vessel rotations and revised connections, all of which make published transit schedules less reliable. Customers may find that sailings depart as planned but still experience delays later in the journey due to operational recovery measures. The risk of rolled cargo and disrupted transhipment connections is also increasing as carriers work through congestion.

For importers, reliability is becoming more important than headline transit times. Maintaining flexibility in inventory planning and reviewing service options regularly will help mitigate the impact of ongoing schedule volatility.

Inland Logistics Could Become the Next Bottleneck

While much attention remains focused on conditions at origin, inland logistics networks in Europe may face growing pressure in the coming weeks. Late vessel arrivals into ports such as Rotterdam and Antwerp can create concentrated surges in container volumes, stretching terminal, trucking, rail and warehousing capacity.

As a result, delays may continue even after cargo has reached its destination

"The latest disruption, caused by Typhoon Saudel, forced operational suspensions at major terminals and further delayed recovery efforts."

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

port. Longer collection times and greater pressure on inland transport providers could affect final delivery schedules across both the UK and mainland Europe.

Customers should monitor container availability closely and focus on end-to-end performance rather than vessel arrival dates alone. The ability to move cargo quickly from destination terminals may prove increasingly important as carriers work through the current wave of disruption.

Port Congestion Disrupts Reliability Across West India

Operational disruption remains a key challenge for shippers moving cargo through India's west coast gateways. Congestion at Mundra and Nhava Sheva (JNPA), coupled with labour disruption at Mundra in late August, has continued to affect vessel schedules, terminal operations and inland transport networks. While capacity concerns dominated discussions earlier in the summer, the focus has now shifted to service reliability and cargo evacuation.

Vessel bunching, rail delays and equipment shortages remain evident across major export corridors, creating uncertainty around cut-off times and cargo planning.

As terminals work through backlogs, schedule recovery is expected to remain uneven throughout September. Carriers may also continue to make short-notice network adjustments, including rolling bookings, omitting port calls and revising vessel windows.

For exporters, flexibility remains critical. Building additional lead time into bookings and maintaining alternative routing options between Mundra and Nhava Sheva could help minimise disruption.

“Vessel bunching, rail delays and equipment shortages remain evident across major export corridors, creating uncertainty around cut-off times and cargo planning.”

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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

Freight Rates Ease, But Volatility Remains

Rates on Indian Subcontinent to Europe services have started to soften after the sustained pricing pressure seen earlier in the year. Early September indicators point to easing freight levels on Asia-Europe trades, offering some relief for importers and exporters. However, local operational challenges continue to create cost pressures at origin.

While carriers are discounting some base freight rates, many continue to apply congestion and operational surcharges where conditions warrant. As a result, lower headline rates do not always translate into significantly cheaper end-to-end shipping costs. Customers focused solely on securing the lowest spot price may also find themselves exposed to weaker space protection and less reliable sailings.

The most effective strategy remains balancing protected allocations for critical shipments with selective use of the spot market where flexibility allows.

Red Sea Disruption Continues to Impact Ocean Networks

The ongoing security situation in the Red Sea continues to have far-reaching consequences for container shipping between the Indian Subcontinent, the Middle East and Europe. Most major carriers remain committed to Cape of Good Hope routings, extending voyage times and reducing effective vessel capacity despite fleet growth elsewhere in the market.

These diversions continue to create schedule uncertainty, increase inventory requirements and maintain pressure on operational costs through war-risk and contingency charges. While the market has adapted to longer transit times, businesses should continue planning around extended lead times and allow additional flexibility for transhipment connections and delivery commitments.

"Rates on Indian Subcontinent to Europe services have started to soften after the sustained pricing pressure seen earlier in the year."

Shruti Jain,
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AIR FREIGHT UPDATE

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- Fuel Costs and Peak Season Demand Push Rates Higher
- AI Infrastructure Boom Creates New Capacity Challenges
- Air Freight Recovery Through Gulf Hubs Remains Uneven

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AIR FREIGHT GLOBAL MARKET OVERVIEW

Fuel Costs and Peak Season Demand Push Rates Higher

Air freight markets are entering the traditional peak season against a backdrop of rising fuel costs and growing demand. Geopolitical uncertainty in the Middle East continues to influence energy markets, with ongoing tensions surrounding Iran contributing to upward pressure on jet fuel prices throughout August. As a result, airline fuel surcharges remain elevated heading into September.

At the same time, demand is increasing as businesses across Europe and North America return from the summer holiday period. The combination of stronger volumes and higher operating costs is expected to place further pressure on freight rates as the industry approaches year-end.

Shippers should expect pricing volatility in the coming weeks and consider securing capacity earlier where possible to avoid peak-season bottlenecks.

AI Infrastructure Boom Creates New Capacity Challenges

A longer-term trend beginning to attract attention is the rapid growth of artificial intelligence infrastructure. Demand for data centres continues to accelerate across Europe and North America, driving increased movement of semiconductors, servers, networking equipment and related technology products.

Many of these products are manufactured in Asia, creating new demand for both air and ocean freight services. Air freight is expected to benefit particularly strongly due to the high value and time-sensitive nature of many technology components.

While the full impact may take time to materialise, sustained demand from AI-related supply chains is expected to place additional strain on global freight capacity. This comes at a time when aircraft production constraints continue to limit the introduction of new capacity into the market.

Businesses with regular air freight requirements should focus on longer-term forecasting and capacity planning. As AI investment continues to gather pace, its influence on freight markets is likely to become increasingly significant.

"Geopolitical uncertainty in the Middle East continues to influence energy markets, with ongoing tensions surrounding Iran contributing to upward pressure on jet fuel prices throughout August."

Leighton Bonnett,
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AIR FREIGHT GLOBAL MARKET OVERVIEW

Air Freight Recovery Through Gulf Hubs Remains Uneven

Air freight performance across key Gulf gateways has improved considerably following earlier regional disruption, with Dubai, Abu Dhabi and Doha all operating more normally. However, recovery across the network remains inconsistent, and capacity conditions can still vary significantly between routes and carriers.

As additional bellyhold capacity returns to the market, rate pressure may ease on some core trade lanes. Nevertheless, airlines continue to monitor regional security developments closely, meaning schedule changes and routing adjustments remain a possibility. Businesses moving high-value or time-sensitive shipments should continue to monitor hub performance and ensure contingency options are available for critical cargo.

"Recovery across the network remains inconsistent, and capacity conditions can still vary significantly between routes and carriers."

Shruti Jain,
Head Partner Developement - Asia
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EUROPEAN LOGISTICS UPDATE

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- Rhine Low Water Raises Freight Capacity Concerns
- September Brings Multiple European Freight Disruptions

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EUROPEAN LOGISTICS MARKET OVERVIEW

Fuel Costs Push European Road Freight Rates Higher in Q2

European road freight rates accelerated sharply in Q2 2026, with both contract and spot markets rising together. Contract rates increased 7.9% QoQ, while spot rates climbed a stronger 14.6% QoQ.

The main driver was cost pressure rather than stronger demand. EU diesel averaged, up 12% QoQ and 27% YoY, while long-haul operating costs increased by almost 10% YoY. Demand, meanwhile, showed signs of stabilisation: road trade volumes fell only 1.6% YoY in Q2. However, capacity remains constrained, with around 13% of European truck-driver positions unfilled.

Fuel-market volatility linked to disruptions around the Strait of Hormuz continues to create uncertainty, with operators increasingly passing higher costs on to customers through freight rates and index-linked contracts.

Looking ahead, rates are expected to remain elevated through 2026 as cost pressures feed through, although weaker industrial demand could limit further increases.

Rhine Low Water Raises Freight Capacity Concerns

Record-low water levels on the Rhine in Germany and the Netherlands are creating serious challenges for European freight. Reduced barge capacity is increasing transport costs and putting pressure on road and rail networks across Germany, the Netherlands, Belgium and Switzerland.

Replacing one large barge movement can require up to 150 trucks, creating significant additional demand for road haulage. Rail operator Kombiverkehr is responding by increasing its Cologne–Basel service in Germany and Switzerland from three to five weekly round trips from 7 September. However, sustained low water could drive higher container transport costs and longer waiting times across the Benelux, Germany and Switzerland.

September Brings Multiple European Freight Disruptions

European freight faces a challenging September, with strikes, tunnel closures and Alpine restrictions affecting key routes across Europe:

- 4 September — Netherlands: Port strike affecting Rotterdam, Amsterdam and Zeeland, with potential terminal backlogs.

"Fuel-market volatility linked to disruptions around the Strait of Hormuz continues to create uncertainty, with operators increasingly passing higher costs on to customers."

Doug Maskell,
Europe and Drinks Commercial Manager
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EUROPEAN LOGISTICS MARKET OVERVIEW

- 7–8 September — Italy: Nationwide rail freight strike, disrupting intermodal services across northern Italy and connections with Germany and the Benelux.
- 7–8 September — France–Italy: Fréjus Tunnel closes overnight, affecting a key HGV route between the two countries.
- 7–11 September — Switzerland: Gotthard Tunnel night closures create additional pressure on Alpine routes.
- 9 September — Netherlands: Rail-sector strike involving ProRail and DB Cargo, affecting Dutch freight movements.
- 10 September — Italy: DB Cargo Italia strike in Lombardy could further disrupt Italy–Germany–Benelux rail services.

Together, these disruptions could cause delays, higher haulage costs and increased pressure on alternative European routes.

“European freight faces a challenging September, with strikes, tunnel closures and Alpine restrictions affecting key routes across Europe.”

Doug Maskell,
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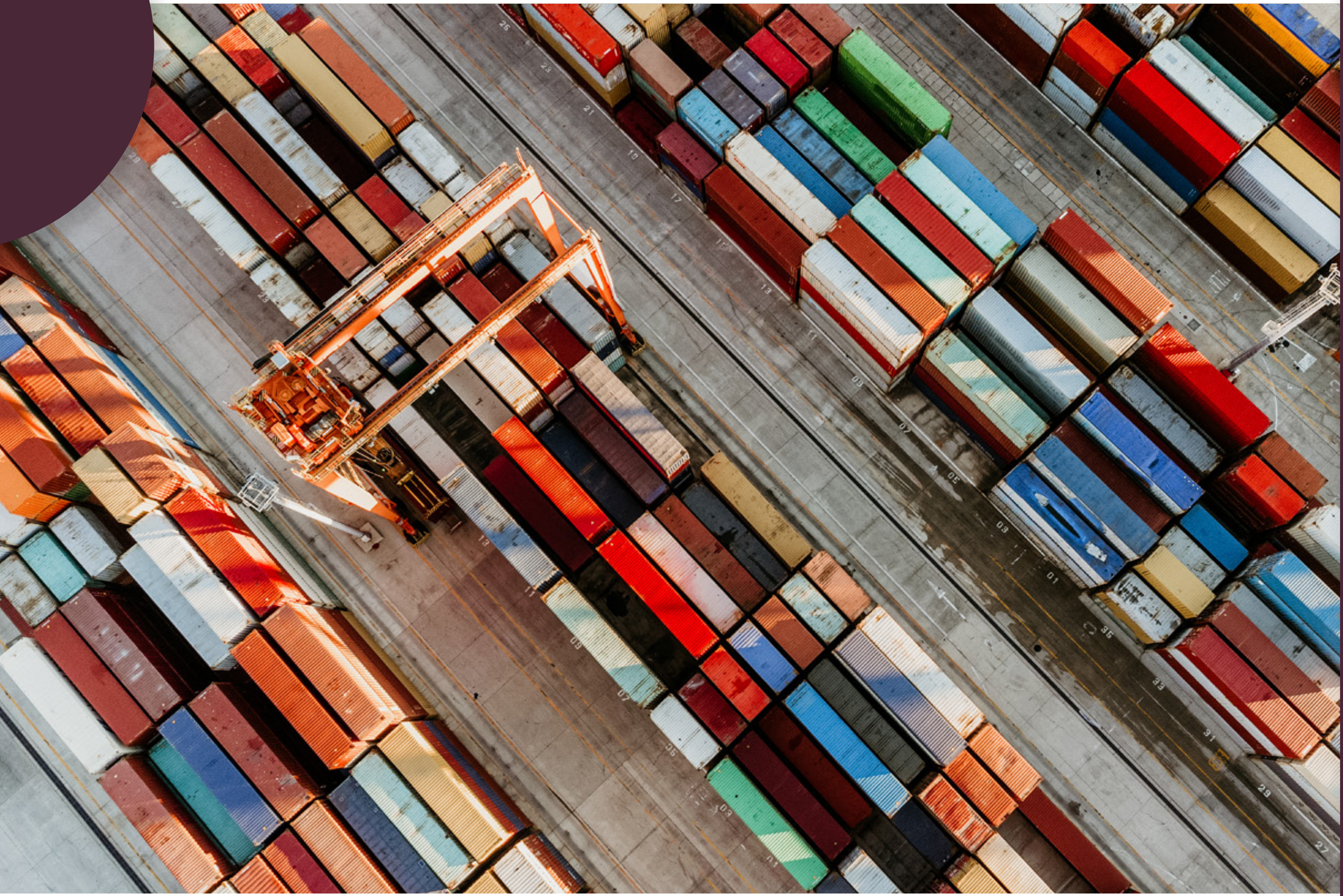
CUSTOMS UPDATE



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- Anti-Dumping Investigation Targets PVC Imports

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CUSTOMS MARKET OVERVIEW

UK Carbon Border Tax Moves Closer to Reality

The UK's Carbon Border Adjustment Mechanism (UK CBAM) remains on track for implementation on 1 January 2027, with further legislation progressing through Parliament during August. The new measure will apply a carbon levy to imports in several carbon-intensive sectors, including aluminium, cement, fertiliser, hydrogen, iron and steel.

The latest legislative developments focus on the practical operation of the scheme, covering areas such as registration, record-keeping, emissions calculations and reporting obligations. Additional guidance is expected later this year, including details around default emissions values that businesses may be able to use where verified emissions data is unavailable.

For businesses importing affected products, preparation should begin now. Reviewing tariff classifications and assessing whether goods fall within the scope of the new regime will be critical to avoiding compliance challenges once the measure takes effect.

Anti-Dumping Investigation Targets PVC Imports

The UK's Trade Remedies Authority has launched a new anti-dumping investigation into imports of suspension polyvinyl chloride (S-PVC) from China, Mexico and South Korea. The investigation centres on allegations that exporters have been selling products into the UK market at unfairly low prices.

While the investigation remains in its early stages, importers should be aware that provisional anti-dumping duties could be introduced before the review is completed. Such measures can be significant and may, in some circumstances, be applied retrospectively.

Businesses sourcing affected products should review their exposure carefully, monitor developments closely and consider alternative sourcing strategies where appropriate. With potential cost implications on the horizon, early planning will be essential.

“The UK's Carbon Border Adjustment Mechanism (UK CBAM) remains on track for implementation on 1 January 2027.”

Toby Spink,
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ENVIRONMENTAL COMPLIANCE UPDATE

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- UK and EU Packaging Rules Continue to Evolve

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ENVIRONMENTAL COMPLIANCE MARKET OVERVIEW

Regulatory Focus Intensifies Around Packaging

While the summer holiday period has brought a quieter legislative calendar, packaging regulation remains firmly in the spotlight. Significant developments are continuing across extended producer responsibility (pEPR), the Packaging and Packaging Waste Regulation (PPWR) and deposit return schemes, all of which have implications for UK producers and businesses trading with the EU.

One of the month's most notable developments is the appointment of new leadership within the Packaging Scheme Forum, which works alongside regulators, Defra and PackUK to support delivery of pEPR. George Atkinson of Valpak has been appointed Chair, while Michael Jennings of Beyondly has taken up the newly created position of Deputy Chair.

UK and EU Packaging Rules Continue to Evolve

Elsewhere, the planned mandatory rollout of flexible plastic collections across England has been delayed until 2030. However, the change affects only mandatory implementation, with existing collections continuing and Wales and Scotland maintaining their target date of March 2027.

The PPWR officially came into force across the EU on 12 August, although harmonised packaging labelling requirements are now expected to be delayed until the first quarter of 2027. Meanwhile, the UK Government has begun exploring potential future alignment with PPWR requirements, particularly in Northern Ireland, and is reviewing the EU's packaging labelling framework as part of wider policy considerations.

For businesses developing packaging today, regulatory direction remains an important area to watch. Long product development and packaging design cycles mean organisations may have limited time to react once future UK policy decisions are confirmed.

Explore our Policy News hub for the latest environmental legislation updates, or get in touch with our friendly team at solutions@beyond.ly or 01756 794951 to discuss how Beyondly can support your compliance and sustainability journey.

"Significant developments are continuing across extended producer responsibility (pEPR), the Packaging and Packaging Waste Regulation (PPWR) and deposit return schemes."

Michael Jennings,
Policy & Public Affairs Advisor
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EDUCATION UPDATE

supply chain academy

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

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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,
Commercial Director at
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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

> **"Delivered through a flexible hybrid model, the apprenticeship combines live online teaching, interactive workshops, workplace projects and independent study."**

Alex Mortimer,
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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 February, 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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