NOVEMBER
2026



MARKET UPDATE

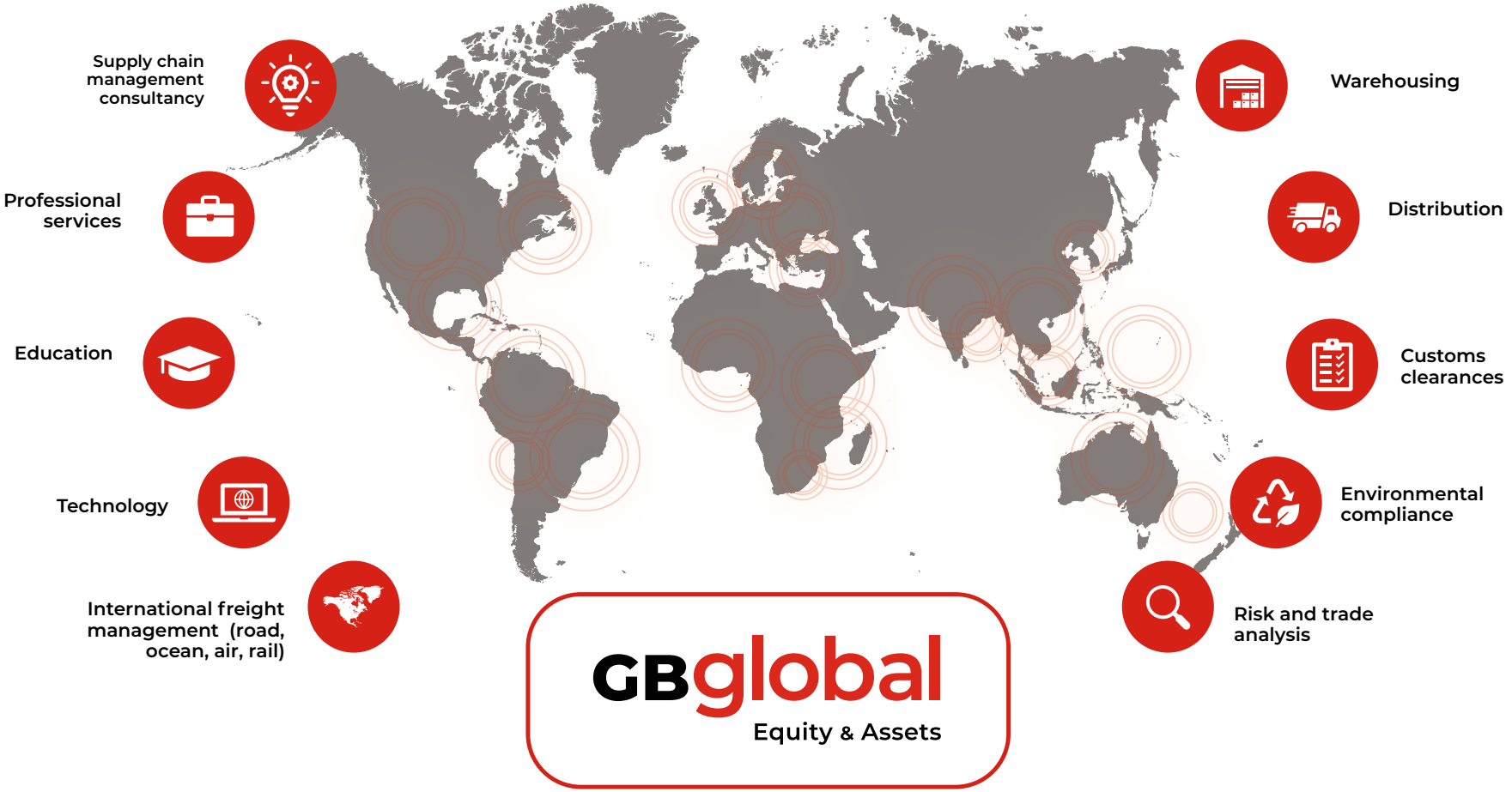
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INTRODUCTION

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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- Capacity Tightens as Year-End Demand Builds
- Southeast Asian Shipments Face Greater Connection Risks
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- Europe Rates Remain Stubbornly High Despite Suez Return
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- Diwali Slowdown Set to Impact Supply Chains

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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

Focus Shifts from Vessel ETAs to Final Delivery Planning

As peak season gathers pace, importers are being urged to look beyond vessel arrival dates and focus on the complete journey from port to final delivery. With Christmas and New Year closures approaching, cargo that arrives on time at a UK or European gateway could still face delays if customs clearance, container collection, haulage or warehouse receiving falls within reduced operating hours.

The result is a growing emphasis on customer receiving schedules rather than vessel ETAs alone. Distribution centres, factories and third-party warehouses are already communicating final delivery cut-off dates, as businesses seek to avoid cargo becoming stranded during festive shutdowns. Importers should ensure receiving calendars are shared with logistics providers and allow sufficient contingency between arrival and delivery deadlines.

Capacity Tightens as Year-End Demand Builds

The Asia-Europe container market is entering a more concentrated year-end shipping period, with seasonal volumes expected to increase throughout November. Capacity continues to be carefully managed through blank sailings and network adjustments, meaning available space may become increasingly limited on preferred sailings.

While headline capacity may appear adequate, the challenge for many shippers is securing space on the specific vessel and departure week needed to meet delivery commitments. Carriers are expected to continue balancing networks as demand rises, increasing the risk of booking rollovers and equipment shortages at some Asian origins. Businesses with time-sensitive cargo should forecast requirements early and maintain flexibility around routing options where possible.

Southeast Asian Shipments Face Greater Connection Risks

Shippers moving cargo from Vietnam, Thailand, Malaysia and Indonesia face an additional challenge as year-end volumes place pressure on regional transhipment hubs, particularly Singapore. Increasingly, the success of a shipment depends not only on the origin departure, but also on securing a reliable onward connection to Europe.

“The Asia-Europe container market is entering a more concentrated year-end shipping period, with seasonal volumes expected to increase throughout November.”



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

As hub utilisation increases, missed connections have the potential to add significant delays to end-to-end transit times. For businesses managing seasonal inventory and retail demand, planning around the full routing rather than the first vessel departure will become increasingly important over the coming weeks.

Attention Already Turning to Chinese New Year

Although Christmas remains the immediate focus for many importers, planning is already extending into early 2027. With Chinese New Year falling on 6 February, the gap between year-end shipments and pre-holiday factory shutdowns will be relatively short.

This compressed planning window means businesses should be developing a single strategy covering December deliveries, January replenishment and final pre-Chinese New Year departures. Those that leave critical shipments until the last available sailings may face greater exposure to production delays, equipment shortages and congestion as factories prepare to close for the holiday period.

“Although Christmas remains the immediate focus for many importers, planning is already extending into early 2027.”



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OCEAN FREIGHT GLOBAL MARKET OVERVIEW

Europe Rates Remain Stubbornly High Despite Suez Return

Many shippers expected freight rates between India and Europe to ease following the widespread return of container services through the Suez Canal. Instead, prices have remained largely unchanged, with carriers continuing to hold rates at levels well above historical norms. Routes from major Indian ports including Nhava Sheva, Mundra, Chennai and Tuticorin continue to attract premiums despite improved transit conditions and softer demand.

While additional Suez transits should gradually improve schedule reliability, carriers remain disciplined in their pricing strategies. The market is beginning to show signs that contract and NAC rates could soften before any significant movement in the spot market. Importers and exporters should monitor developments closely, as competition for volumes may eventually force carriers to become more aggressive in their pricing.

US Freight Rates Continue to Defy Expectations

The anticipated decline in rates to the United States has yet to materialise. Freight costs from India to both the East and West Coasts remain elevated, despite improved vessel availability and lower demand than seen earlier in the year.

For businesses moving goods into the US, higher shipping costs continue to influence inventory planning and landed costs. While additional capacity entering the market could create downward pressure in the coming weeks, carriers are still managing supply carefully. Businesses reliant on spot market pricing should remain prepared for sudden shifts as shipping lines look to balance volumes and yield.

Improved Capacity Creates Opportunities for Shippers

One of the most positive developments this month has been the significant improvement in equipment availability and vessel space across India's major export gateways. Carriers are actively seeking cargo bookings, a marked contrast to the capacity constraints experienced earlier in the year.

The increased availability is creating greater flexibility for exporters, with more opportunities to negotiate rates and secure preferred sailings. As competition between carriers intensifies, businesses may find favourable conditions for reviewing existing freight agreements and exploring longer-term pricing arrangements.

“Many shippers expected freight rates between India and Europe to ease following the widespread return of container services through the Suez Canal.”



Shruti Jain,
Head of Partner Development - Asia
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Diwali Slowdown Set to Impact Supply Chains

Attention is also turning to the impact of Diwali on manufacturing and logistics activity across India. Reduced staffing levels and temporary factory shutdowns are expected to affect production schedules, customs processing and transport availability throughout the holiday period.

As is typical during major festivals, disruption is likely both before and after the celebrations, with businesses rushing shipments ahead of closures before a subsequent surge in activity once operations resume. Companies with time-sensitive cargo should ensure production schedules, transport arrangements and booking plans are aligned well in advance to minimise the risk of delays.

“Companies with time-sensitive cargo should ensure production schedules, transport arrangements and booking plans are aligned well in advance to minimise the risk of delays.”



Shruti Jain,
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AIR FREIGHT UPDATE



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KEY HEADLINES

- Oil prices rose again through October
- Joint Development of International Aviation Hubs in Guangzhou, Shenzhen, and Hong Kong
- Strong Export Growth Continues to Support Demand
- Navi Mumbai Cargo Operations Face Further Delays
- More Capacity Brings Greater Flexibility

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AIR FREIGHT GLOBAL MARKET OVERVIEW

Oil prices rose again through October, driven by the largely unchanged situation in the Strait of Hormuz and the renewed conflict between Saudi Arabia and the Houthi rebels in Yemen. This continues to feed through to air freight pricing, with many carriers reflecting these increased costs in pricing, keeping rates elevated. Despite this, demand is strong and that, coupled with the fuel surcharges, has resulted in week-on-week rate rises from the Far East and Southeast Asia since the return to work after the Autumn festival break.

E-commerce volumes to Europe were expected to remain low, with the introduction of additional charges on import from the start of November. Despite these, consumer demand for lower priced products from Asia in the run up to year end appears to be strong, and volumes are increasing, though not at levels we saw last year. Black Friday, Thanksgiving and Christmas are still expected to encourage demand and put pressure on the air freight capacity through November.

The supply of hi-tech and other equipment required to meet the demand of the growing number of data centres being developed across North America and Europe is also bringing good volumes to the air freight market. The urgency of development in AI means that air freight is a logical choice to support this growth for the foreseeable and demand is not seasonal, so expected to run well into 2027.

Transatlantic volumes are increasing as we move into year end. Whilst common at his time of year, we have seen demand arrive a little later than usual. Rates are now increasing and capacity is tight with dwell times of several days to some destinations in North America. Advanced planning and booking is essential to avoid delay.

We are keen to support customer requirement through the balance of 26 and into 27. If you have a demand for air freight, please reach out to discuss the solutions we can provide and build into our discussions with carriers.

Joint Development of International Aviation Hubs in Guangzhou, Shenzhen, and Hong Kong

Eight China's government departments, including the Ministry of Transport, recently issued the "15th Five-Year Plan for the Development of Integrated Transport Hubs". The plan outlines the accelerated development of four major international integrated transport hub clusters, including the one in the Guangdong-Hong Kong-Macao Greater Bay Area. It calls for advancing the development of international aviation hubs in Guangzhou,

"E-commerce volumes to Europe were expected to remain low, with the introduction of additional charges on import from the start of November."



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AIR FREIGHT GLOBAL MARKET OVERVIEW

Shenzhen, and Hong Kong, and fostering synergistic growth in the aviation sector across the Greater Bay Area.

Strong Export Growth Continues to Support Demand

India's air freight market remains supported by robust export performance, particularly across trade lanes serving the UK, Europe and North America. September export growth reached 23%, while shipments to the UK received an additional boost following the India-UK Free Trade Agreement. Major gateways including Delhi, Mumbai, Bengaluru, Chennai and Hyderabad continue to see healthy activity levels.

Despite a softer overall freight market and increasing competition from ocean freight, export growth is helping to maintain stable demand for air cargo services. Airlines are expected to maintain current capacity levels through the remainder of the year, although selective pressure may emerge on high-demand routes during peak periods.

Navi Mumbai Cargo Operations Face Further Delays

Expectations surrounding the opening of Navi Mumbai International Airport continue to be tempered by delays to cargo infrastructure development. While airlines are progressing plans for future operations, warehousing and associated cargo facilities are not yet ready to support large-scale international freight activity.

The transition period is creating a shortage in capacity as some freighter operators, whose flights have been redirected via NMI, are limited or delaying flights whilst the infrastructure catches up. We are seeing inflated in and outbound freight costs, isolated to Mumbai as a consequence.

More Capacity Brings Greater Flexibility

Apart from the short-term challenges in Mumbai, air freight capacity constraints have eased in recent months. Airlines are slowly expanding services across key Indian gateways, creating more routing options and improving connectivity. Recent developments include increased frequencies between Chennai and Bangkok, the return of Colombo-Chennai services and strengthened international partnerships supporting Bengaluru's global network.

The result is providing exporters with greater choice and improved schedule flexibility. Rate levels remain stable, despite higher volumes, as a consequence of these improvements.

“Despite a softer overall freight market and increasing competition from ocean freight, export growth is helping to maintain stable demand for air cargo services.”



Shruti Jain,
Head Partner Development - Asia
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EUROPEAN LOGISTICS UPDATE



KEY HEADLINES

- Bulgaria–Turkey Border: HGV Delays Expected During Kapitan Andreevo Upgrade
- Italy: HGV Protests Disrupt Freight Operations
- France: Protests Disrupt Collections and Deliveries in Paris

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EUROPEAN LOGISTICS MARKET OVERVIEW

Bulgaria–Turkey Border: HGV Delays Expected During Kapitan Andreevo Upgrade

Cross-border road freight between Bulgaria and Turkey faces increased disruption as major reconstruction works continue at the Kapitan Andreevo border crossing. The project, which began on 10 August, aims to increase the crossing's capacity by 25%, while modernising and expanding HGV processing lanes.

However, construction is expected to continue for approximately 11 months, with works being completed in phases to keep the border operational. Bulgarian authorities have warned that increasing HGV volumes could lead to vehicle build-ups, slower freight processing and queues in both directions.

The crossing is a key gateway for Turkey–EU road freight, meaning delays could affect transit times for services moving through Bulgaria towards Central and Western Europe. Hauliers using the corridor should therefore allow additional lead time and monitor border conditions while the upgrade works remain ongoing.

Italy: HGV Protests Disrupt Freight Operations

Italy has faced significant road freight disruption following HGV protests over rising diesel prices and operating costs. Hauliers have staged blockades across parts of southern Italy, particularly around Naples and Campania, affecting motorway routes and access to key logistics and port areas.

The action has created delays for goods movements and increased pressure on already stretched road transport operations. Although the protest was suspended from 23 October while discussions with the Italian Government continue, the underlying cost concerns remain unresolved.

Operators moving freight to and from Italy should therefore continue to allow additional transit-time contingency and monitor the situation closely.

France: Protests Disrupt Collections and Deliveries in Paris

France is experiencing renewed social unrest, with demonstrations in Paris creating significant challenges for urban freight collections and deliveries.

Recent protests have led to road

"Cross-border road freight between Bulgaria and Turkey faces increased disruption as major reconstruction works continue at the Kapitan Andreevo border crossing."



Doug Maskell,
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EUROPEAN LOGISTICS MARKET OVERVIEW

closures, police cordons and restrictions across parts of the capital, while the 24 October mobilisation saw around 110,000 demonstrators in Paris and significant transport disruption.

Central areas have been particularly sensitive, with businesses closing or boarding premises and authorities restricting demonstrations around major commercial and government districts.

The operational impact is therefore likely to remain concentrated on last-mile collections and deliveries in Paris, where short-notice road closures, diversions and restricted access can make scheduled HGV movements difficult.

The situation could extend further, with another cross-sector mobilisation expected on 5 November, meaning operators should allow additional lead time and closely monitor access restrictions before dispatching vehicles into Paris.

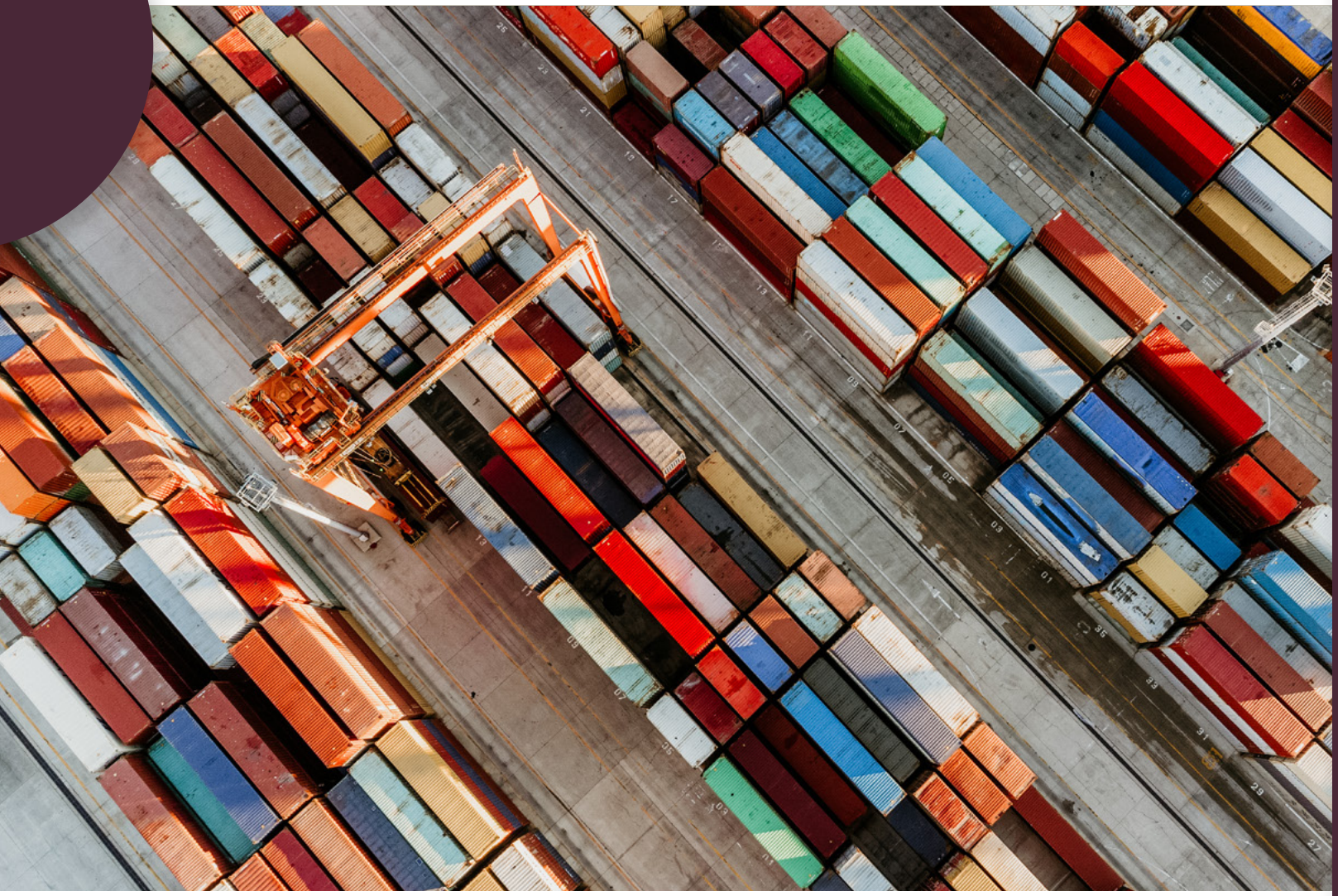
“Operators should allow additional lead time and closely monitor access restrictions before dispatching vehicles into Paris.”



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CUSTOMS UPDATE



KEY HEADLINES

- New EU Handling Fee Arrives for Distance Sales
- Indonesian Duty Preferences Near Their End

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CUSTOMS MARKET OVERVIEW

New EU Handling Fee Arrives for Distance Sales

Businesses selling goods into the European Union through distance sale transactions face an important change from 1 November, when a new Union Handling Fee (UHF) comes into effect. Under the updated customs framework, EU customs authorities will apply a fixed fee of €2 per item on qualifying imports entering free circulation.

While the charge may appear modest on individual transactions, its cumulative impact could be significant for high-volume ecommerce businesses and their supply chain partners. The additional cost will need to be reflected within pricing structures, customs processes and operational planning.

Companies trading with the EU should review the potential financial impact now and ensure customs declarations and VAT accounting procedures are fully aligned with the new requirements. Increased customs scrutiny of qualifying shipments may also follow as authorities implement the new regime.

Indonesian Duty Preferences Near Their End

Importers sourcing products from Indonesia are being reminded that the country's preferential access to the UK's Developing Countries Trading Scheme (DCTS) will end on 1 January 2027. The change follows Indonesia's classification as an Upper Middle-Income Country and will see trade move to standard UK tariff arrangements.

Most businesses have been preparing for the transition during the 18-month adjustment period, but organisations yet to assess the impact should do so urgently. The change could increase import costs for certain products and may affect businesses using Indonesian-origin materials within wider regional supply chains.

With only a short period remaining before implementation, businesses should review sourcing arrangements, assess tariff exposure and, where possible, bring forward shipments to benefit from the remaining period of preferential treatment.

“Under the updated customs framework, EU customs authorities will apply a fixed fee of €2 per item on qualifying imports entering free circulation.”



Toby Spink,
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ENVIRONMENTAL COMPLIANCE UPDATE



KEY HEADLINES

- Deposit Return Scheme Registration Opens

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ENVIRONMENTAL COMPLIANCE MARKET OVERVIEW

Deposit Return Scheme Registration Opens

The UK's Deposit Return Scheme (DRS) reached a significant milestone in September with the opening of Phase 1 registration for producers and retailer return points. Managed by Exchange for Change, the process marks the first practical step towards the scheme's launch in October 2027.

The scheme will apply across the UK to single-use drinks containers made from PET plastic, aluminium and steel, ranging from 150ml to three litres. Businesses placing these products on the market will be required to register and report relevant packaging information.

For now, the registration process focuses on core business details, giving organisations time to prepare before more detailed reporting requirements are introduced in January 2027. While producer fees will initially be set at zero when the scheme launches, businesses should begin preparing for future compliance obligations, product data requirements and labelling changes.

The latest development provides much-needed clarity for affected businesses, but it also serves as a reminder that preparation should begin now. Organisations that take early steps to understand their obligations and establish internal ownership for DRS compliance are likely to be best positioned ahead of implementation.

“The UK's Deposit Return Scheme (DRS) reached a significant milestone in September with the opening of Phase 1 registration for producers and retailer return points.”



Michael Jennings,
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EDUCATION UPDATE



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- Supply Chain Academy Hosts Greater Essex Skills Board Meeting to Support Regional Workforce Development

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SUPPLY CHAIN ACADEMY HOSTS GREATER ESSEX SKILLS BOARD

Supply Chain Academy Hosts Greater Essex Skills Board Meeting to Support Regional Workforce Development

Supply Chain Academy recently welcomed representatives from Essex Chambers of Commerce and the Greater Essex Skills Board to its Upminster HQ on 13th October 2026, bringing together key stakeholders to discuss the future of skills, employment and workforce development across the region.

Chaired by Joanne Giles, the meeting provided an opportunity for employers, education providers and industry representatives to review progress against the Greater Essex Local Skills Improvement Plan (LSIP) 2026–2029 and explore opportunities for greater collaboration.

Led by Essex Chambers of Commerce, the LSIP aims to ensure education and training provision reflects the evolving needs of businesses across Essex, Southend and Thurrock, helping employers address skills shortages, improve productivity and develop future talent.

The latest plan has been shaped by engagement with more than 2,000 local employers, identifying challenges around recruitment, workplace readiness, digital capabilities and access to relevant training.

Key agenda items included updates on existing actions, preparations for the LSIP launch event, employer participation and engagement, and progress relating to the Get Essex Working Plan.

The LSIP identifies seven strategic priorities, including essential workplace skills, leadership and management development, inclusive career pathways, digital transformation and artificial intelligence, and clean energy skills.

For Supply Chain Academy, these priorities closely align with its commitment to delivering industry-led education, professional development and apprenticeship programmes that equip individuals and businesses with practical, future-ready skills.

With transport and logistics recognised as an important sector within the regional economy, developing skilled professionals across supply chain operations, procurement and logistics remains essential to supporting sustainable business growth.

Hosting the meeting reinforces Supply Chain Academy's commitment to connecting education with industry and supporting meaningful partnerships between employers and training providers.

"The meeting provided an opportunity for employers, education providers and industry representatives to review progress against the Greater Essex Local Skills Improvement Plan."



Alex Mortimer,
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SUPPLY CHAIN ACADEMY HOSTS GREATER ESSEX SKILLS BOARD

As part of GB Global, Supply Chain Academy continues to champion accessible, workplace-focused learning that helps organisations address skills gaps, develop talent and prepare for future challenges. By working collaboratively with regional stakeholders, Supply Chain Academy is proud to contribute towards building a stronger, more skilled and resilient workforce across Greater Essex.

Makayla Whyte, Supply Chain Academy's CEO, said: "Through our involvement with the Greater Essex Skills Board, SCA is proud to work alongside employers and education providers serving a wide range of industries. The Board brings us together to share knowledge, learn from one another and work towards a common goal: ensuring education responds to real business needs.

"By combining our expertise, we can help people build rewarding careers, support businesses to develop the talent they need and contribute to a stronger, more resilient local economy."

For more information about Supply Chain Academy's apprenticeships and short courses, or to discuss how they could support your organisation, contact **info@supplychainacademy.org.uk**.

"Supply Chain Academy continues to champion accessible, workplace-focused learning that helps organisations address skills gaps, develop talent and prepare for future challenges."



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