

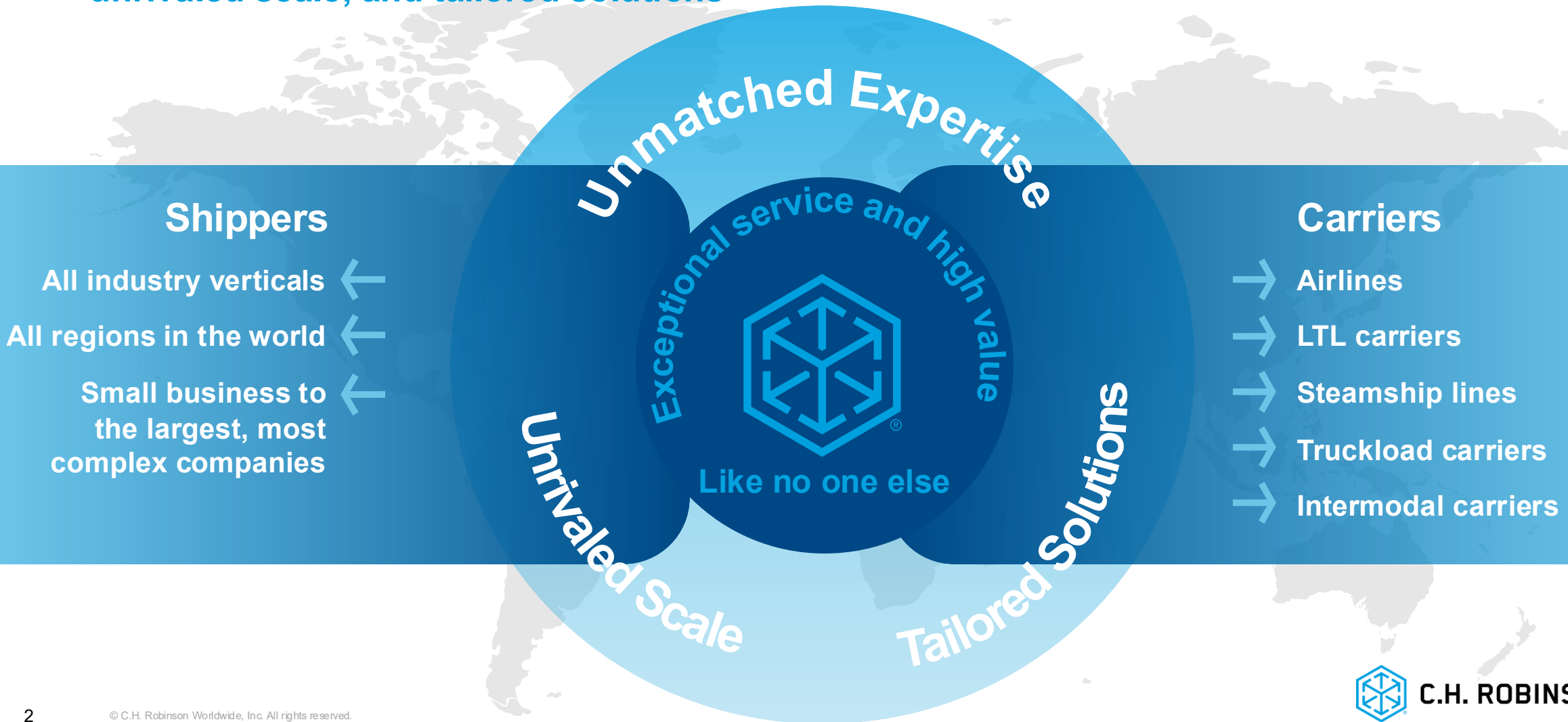
AUGUST 2025 REPORT

**C.H. Robinson**  
**Edge™**

# → Simplifying logistics—across the world

Overview

We solve challenges through our unmatched expertise, unrivaled scale, and tailored solutions



## → August 2025 Freight Market Update

- 1 Key Takeaways
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- 3 Ocean Freight
- 4 Air Freight
- 5 LTL Shipping
- 6 Trade Policy



# → Key Takeaways

## High-level insights at a glance

- U.S. spot market cost/mile forecast introduced for 2026
  - +2% year over year growth for dry van
  - +2% year over year for refrigerated van
- U.S. spot market cost/mile forecast cut for 2025
  - +1.5% year over year growth for dry van (down from +4%)
  - -1% year over year for refrigerated van (down from +/-0%)
- Due to recent NMFC changes, a dimensioner may save you freight costs for LTL shipments
- Ocean carriers cut capacity as tariff-driven demand surge fails to materialize
- Air Capacity corrections accelerate as inventory buildup cycle ends
- The U.S. has released multiple trade announcements
  - Including tariffs Brazil, Copper, and the removal of de minimis
- U.S. import partners over recent years shows a continued trend to de-risk from China



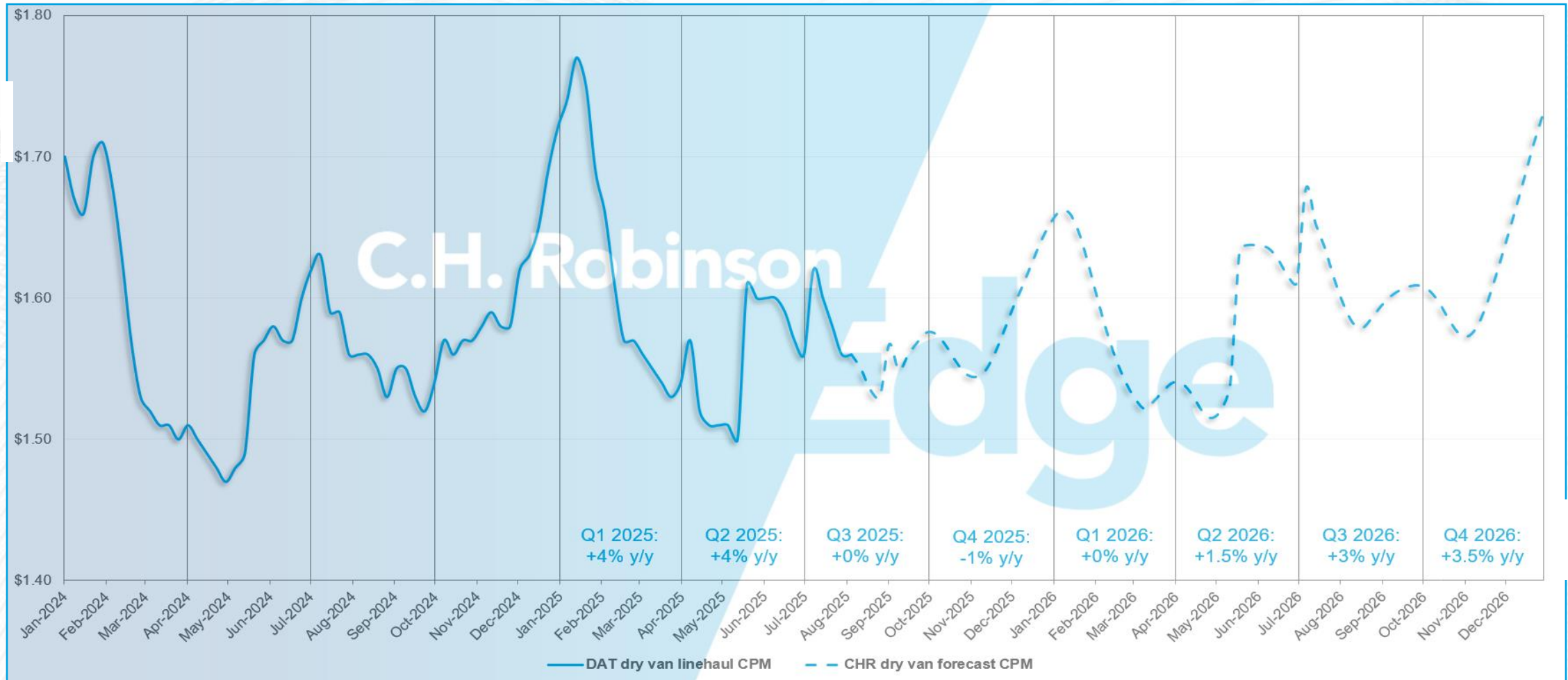
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# Truckload

# → U.S. Spot Market Forecast | Dry Van

Truckload

2025 +1.5% linehaul cost/mile increase y/y, 2026 +2% increase y/y

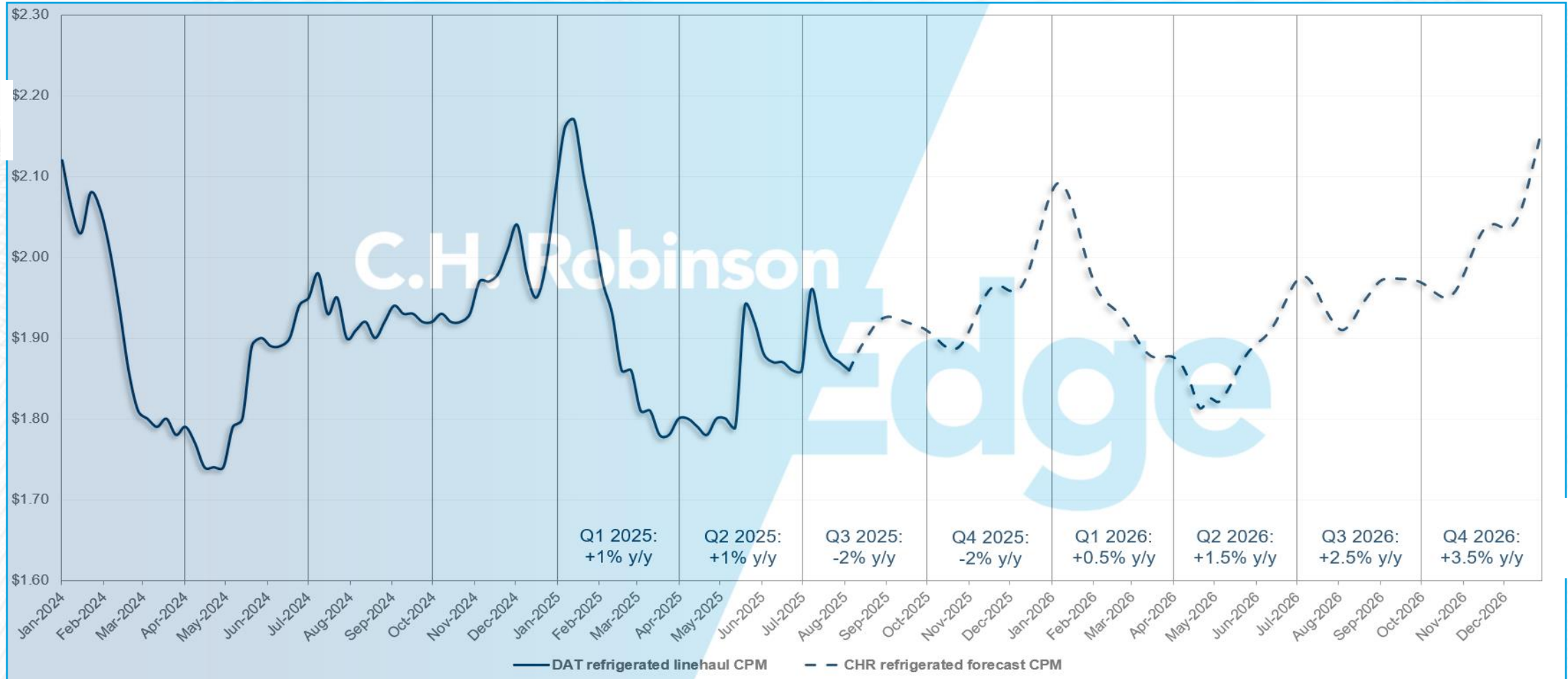




# → U.S. Spot Market Forecast | Temperature Controlled

Truckload

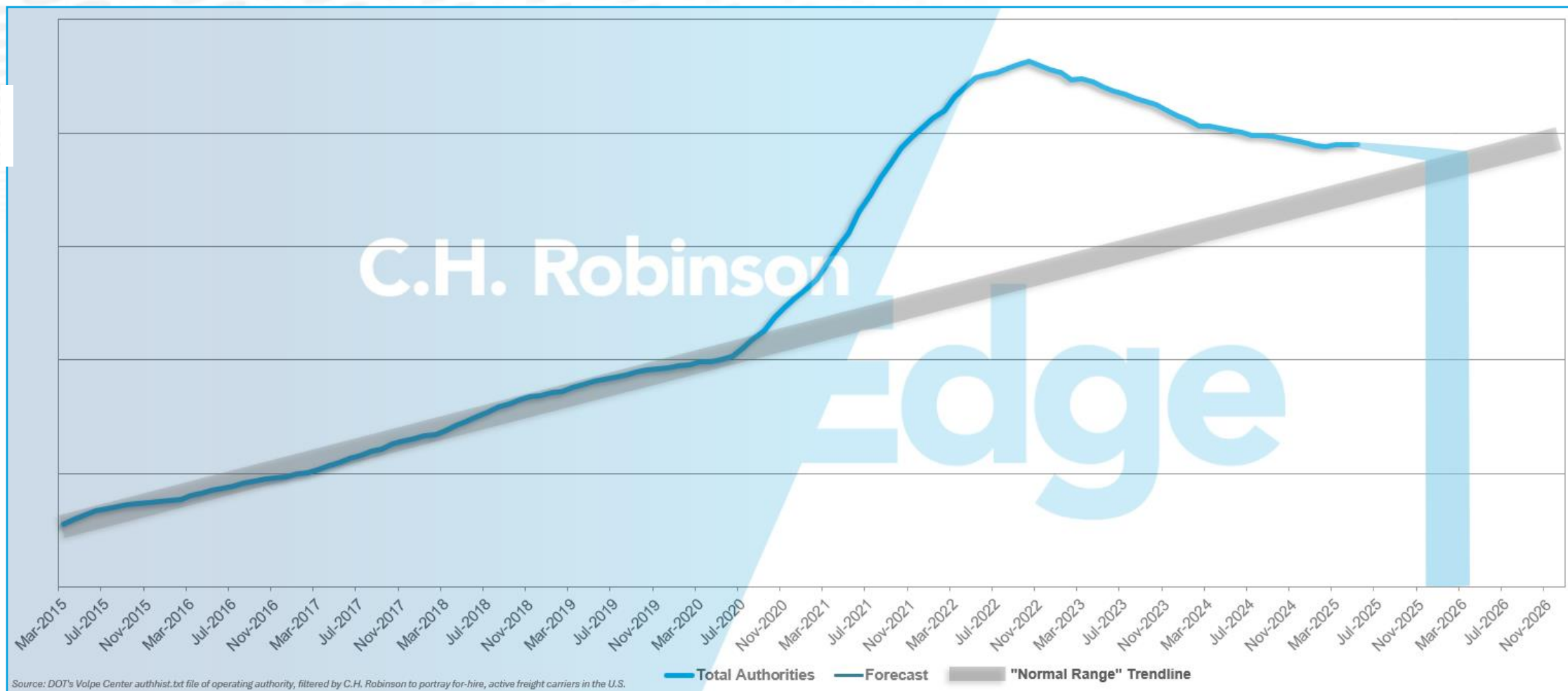
2025 -1% linehaul cost/mile increase y/y, 2026 +2% increase y/y



# → U.S. For-Hire Capacity Forecast

Truckload

Carrier authorities expected to be in line with historical trends in early 2026







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# Ocean Freight

# → Ocean Freight

Ocean

## Ocean carriers cut capacity as tariff-driven demand surge fails to materialize

### Global Overview

- MSC withdraws Pearl service; additional blank sailings expected across trade lanes

### Asia

- Trans-Pacific rates slide as China volumes drop 27% year over year
- Asia-Europe rates hold firm due to persistent North European port congestion

### Europe

- Port congestion at Rotterdam, Antwerp, Hamburg extends vessel turnaround times, reducing capacity
- July rate increases prove sustainable, extending into August
- Service reliability improving but infrastructure bottlenecks persist

### North America

- Exports to Asia face severe container shortages from reduced import flows
- Service suspensions to Pakistan create capacity constraints due to geopolitical tensions
- Rail labor agreements in Canada eliminate strike risks through 2027
- Wildfire season poses potential service risks through September

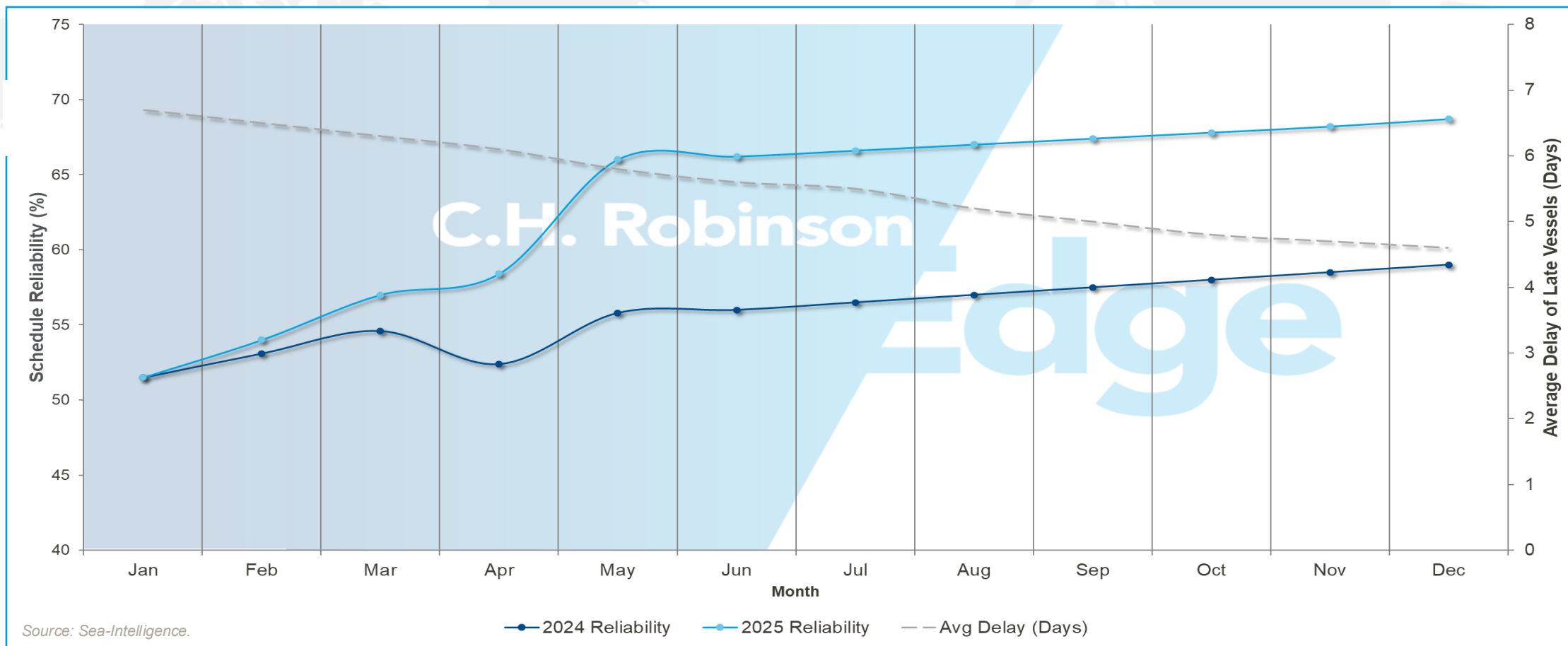
### South Asia, Middle East, Africa (SAMA)

- India-Pakistan tensions force cargo rerouting via Colombo transshipment

# → Global Ocean Performance: Reliability vs. Delay

Ocean

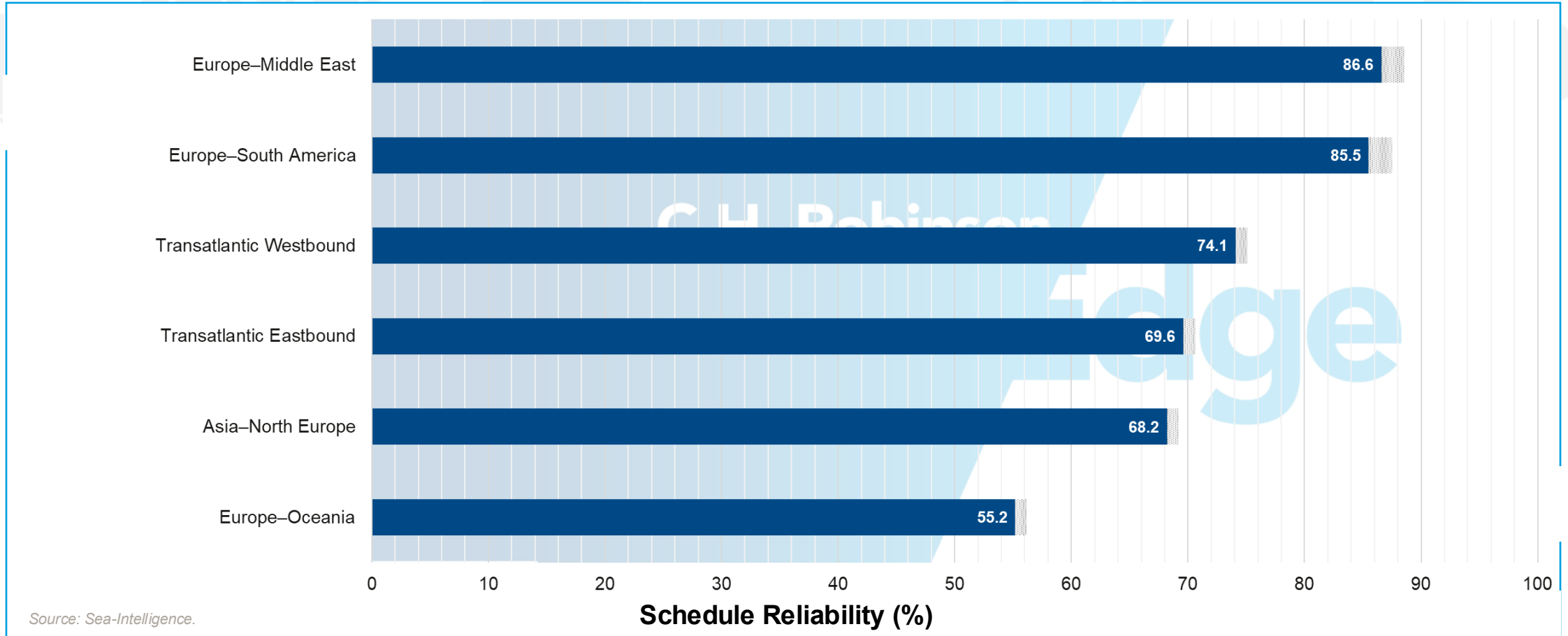
Ocean reliability rises, setting the stage for a more predictable peak season



# → Europe Schedule Reliability: Current & Projected

Ocean

Stronger Europe reliability meets a wave of congestion

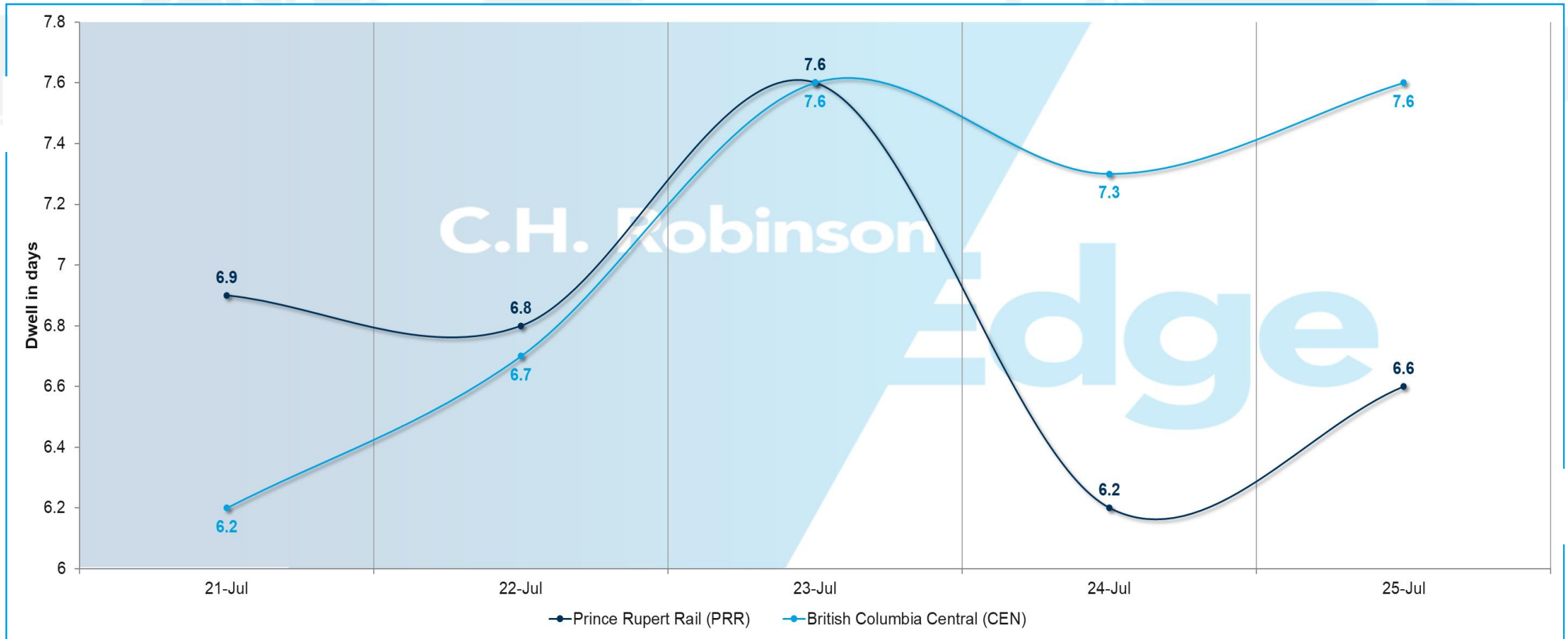




# → Canada average dwell time > 5 days

Ocean

Operational performance varies significantly by terminal







# Air Freight

# → Air Freight

Air

## Capacity corrections accelerate as inventory buildup cycle ends

### Global Overview

- Carriers right-sizing capacity after early inventory frontloading ends
- Tariff-driven demand surge has faded; flight cancellations and route shifts underway

### Asia

- Ecommerce faces headwinds from tepid U.S. demand and regulatory enforcement
- Peak season disrupted by early inventory buildup; carriers reassessing allocations

### Europe

- Summer passenger travel increases belly capacity
- Market stabilizing post-frontloading; 4–10 day booking windows common

### North America

- Capacity generally balanced across most lanes
- Advance booking critical for routes to São Paulo, Bogotá, Santiago, and Buenos Aires

### South America

- Brazil faces 50% U.S. tariffs triggering shipment cancellations and capacity surplus
- GRU booking constraints persist while merger talks may reshape domestic air cargo

### South Asia, Middle East, Africa (SAMA)

- Red Sea crisis shifts ocean cargo to air, straining capacity
- Delivery timing remains unpredictable due to regional volatility

### Oceania

- Passenger flight prioritization limits aircraft availability for freight
- Expect longer lead times and rising rates through September



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# LTL Shipping



# → NMFTA Classification Changes

LTL

Accurate measurements are now essential for LTL shippers

- Market conditions remain stable
  - Stubbornly soft shipment volumes and tonnage continue
  - Carriers focus on cost control and targeting well-aligned freight
  - Pricing discipline persists despite profitability pressures on carriers
- NMFC changes are now live
  - Effective July 19, 2025
  - Implementation has been smooth with minimal delays
  - Some carriers temporarily supporting both old and new standards
  - Dimensioners boost accuracy for LTL shipments, ultimately lowering costs





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# Trade Policy & Customs



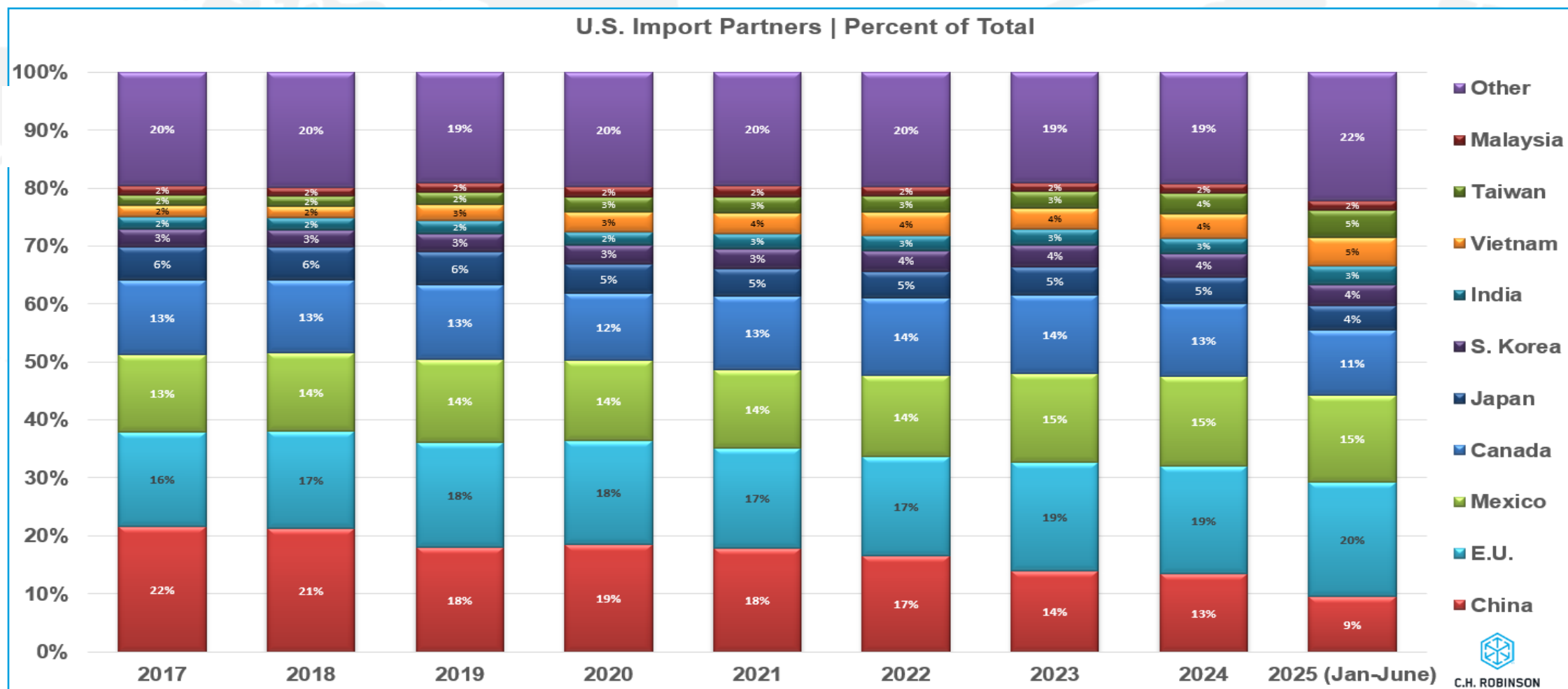
# → Navigating Tariff Impacts

## Recent announcements from the U.S. government

- 50% tariff on copper imports, effective August 1
- 40% tariff on imports from Brazil, effective August 6
- De minimis exemption being removed, effective August 29
- Utilize C.H. Robinson's [U.S. Reciprocal Tariff Tracker](#) for the most up-to-date tariff deal announcements
- The C.H. Robinson [Sourcing Analysis Tool](#) tracks sourcing trends for imported products to assist reduce or eliminate duties

# → Shifting Trade Tides

How U.S. trade policy has reshaped import partnerships



# Thank you

For more content, reach out to a C.H. Robinson account manager

