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EDITORIAL

Cargo is still arriving in volume this autumn, yet the routes and schedules that carry it look less dependable than the totals suggest. This month's stories sit in the gap between how much freight is moving and how reliably it can be moved.

Import data point to strength at U.S. gateways, while security incidents in a key Gulf passage and uneven carrier performance across the Pacific pull the other way. Rates on some trades have begun to climb after a long slide, though the roundup cautions that it is not yet clear how durable those gains are. Capacity coming back to some routes may take time to show up as steadier service.

For packaging buyers and the brands that depend on them, headline volume is only part of the planning picture. Delivery commitments, booking access and routing choices rest on conditions that keep shifting. The articles that follow set out where the pressure sits and what the data does and does not establish.

EXECUTIVE TAKEAWAYS

Four themes connect this issue, covering volume versus reliability, security exposure, capacity signals and carrier-level planning.

01 **Strong volumes and weak service can coexist**

Robust U.S. import totals sit alongside poor on-time arrival readings on the Pacific lane, so volume data on its own may reveal little about whether goods reach port when promised (Articles 1 and 3).

02 **Security data may understate real exposure**

United Kingdom Maritime Trade Operations (UKMTO) notes that its attack count could be incomplete because most vessels do not report, and the new Black Sea surveillance measures are not presented as proof that risk has eased, so maritime security remains a live planning variable (Articles 2 and 4).

03 **Capacity signals point in different directions**

On the Asia-North America lane, planned capacity is forecast to tighten, while Red Sea capacity is rebuilding. The sources caution that easier space after Golden Week and steadier schedules from returning capacity may both be slow to arrive (Articles 3 and 4).

04 **Carrier-level detail may matter more than lane averages**

Lane-level indicators in the Asia-North America outlook do not forecast individual shipments, and results there differ widely among the top 10 carriers. With the roundup also advising a review of carrier-specific performance, buffers and booking checks may be better set carrier by carrier (Articles 3 and 4).

IN THIS ISSUE

01 A Record September for U.S. Container Imports, With China's Share Up From August

02 Reported Attacks Near Hormuz Hit a Weekly High While Transit Counts Stay Far Below Normal

03 Punctual Arrivals on the Asia-North America Lane Fell to About One in Four in September, and the Outlook Points to Harder Bookings

04 Some Ocean Rates Turn Up After a Long Slide, but Cancellations and Security Incidents Keep Planning Uncertain

A Record September for U.S. Container Imports, With China's Share Up From August

WHY IT MATTERS

U.S. container inflows set a September record even though the report describes worldwide container flows as turbulent, so strong volume and difficult conditions are showing up together. For packaging buyers, the report is a snapshot of inbound volume and of the risks that could shape that volume in the months ahead.

2,546,261 TEUs
U.S. container imports in September 2026

24.8%
Gap above the pre-Covid level of September 2019

924,454 TEUs
China-origin imports in September 2026

HIGHLIGHTS

- September 2026 imports reached 2,546,261 TEUs, the highest September on record, 2.2% below August but 10.3% above September 2025.
- China's share of all U.S. container imports climbed from 34.0% in August to 36.3%, on 924,454 TEUs of China-origin volume that ran 21.2% above a year earlier.
- Descartes names Middle East security, tariff measures, gateway delays, Red Sea routing and macroeconomic indicators among the areas it is following into the coming months.

→ Volume Picture

- Compared with the pre-Covid level of September 2019, Descartes puts September 2026 volume 24.8% higher.
- The report credits China-origin cargo with much of the rise, and it places the gain in a period it describes as stormy for container flows worldwide.

→ China-Origin Detail

- Versus August, China-origin volume of 924,454 TEUs rose by 40,136 TEUs (4.5%), and versus September 2025 it rose by 161,682 TEUs (21.2%).
- The table below orders China's September import categories by their share of China-origin volume, grouped by HS chapter as the report presents them.

Category (HS chapters)	TEUs	Share of China-origin volume
HS-84 machinery and HS-85 electrical machinery, combined	Not stated	17.6%
Plastics (HS-39)	135,097	14.6%
Furniture and bedding (HS-94)	123,574	13.4%
Apparel, made-up textiles and footwear (HS-61 to HS-64)	Not stated	11.1%
Sporting goods and toys (HS-95)	92,842	About 10%

135,097 TEUs

Plastics (HS-39) was the largest single China-origin import category in September, making up 14.6% of that volume and running ahead of furniture and bedding.

→ Conditions Behind the Numbers

- Routing and cost risk increased during the period, which Descartes links to Middle East maritime incidents and to new fuel charges from carriers.
- Security in the Red Sea is still in doubt, yet certain Suez Canal services are being restarted by some carriers.
- Section 301 measures, and Section 232 measures beyond the pharmaceutical ones, still carry weight depending on origin and product, and specified importers became subject in September to additional pharmaceutical-related Section 232 duties.

→ Risks the Report Is Tracking

- Middle East conflict and maritime security come up first, with reported incidents continuing around the Strait of Hormuz. Route selection and the cost of freight can both be swayed by fuel and insurance exposure, and the surcharges carriers have imposed illustrate that link.
- New York/New Jersey saw the steepest rise in delays in September, and eight of the top 10 gateways had longer delays overall. In the report's reading, fewer delays could reflect either weaker goods and logistics demand or a more efficient global supply chain, and it advises watching whether the increases carry into October.
- Red Sea routing is a further watch item. Vessel capacity, transit times and schedules could all be hit if renewed disruption sends ships back around the Cape of Good Hope.
- The report calls the U.S. economy import-driven. On September 16 the Federal Reserve lifted its target range for the federal funds rate to 3.75%-4.00%. A first quarter revised to 2.5% was followed

by second-quarter real GDP growth of 2.2% annualized in the Bureau of Economic Analysis' third estimate.

- Looking ahead, the report treats interest-rate conditions, energy costs, inflation and consumer demand as key gauges for import volumes.

LESSONS & ACTIONABLES

Importers moving goods through New York/New Jersey, or through another top-10 gateway where delays rose in September, may want to check whether those delays continued into October at their own entry ports, the test the report sets for whether the rise is persisting. Buyers with China-origin inputs may also want to compare their inbound mix with the HS categories behind China-origin volume, starting with plastics (HS-39).

Reported Attacks Near Hormuz Hit a Weekly High While Transit Counts Stay Far Below Normal

WHY IT MATTERS

UKMTO counted more vessel attacks in and around the Strait of Hormuz in one week than it has tracked there before, and its October 18 advisory expects further incidents. Traffic through the strait is also running light, so the exposure sits on a corridor already carrying less than usual.

12
Vessels targeted near the strait between October 5 and 11

6
Vessels struck on October 11, a single-day high

254
Commercial transits in the October 8 to 14 week, roughly 70% under pre-conflict weekly levels

HIGHLIGHTS

- UKMTO logged attacks on 12 vessels between October 5 and 11, more than in any single week it has previously tracked in the area, and six of them were hit on October 11 alone.
- Attacks did not stop after that week. In an October 18 advisory, UKMTO judged more attacks likely over the days and weeks ahead and kept its regional threat assessment at severe.
- Because most vessels refuse to report to UKMTO, the agency notes that its attack count could understate the true figure.

→ Weekly and Daily Counts

- Calling these records rests on just the 12-vessel week and the six-vessel day, since the source gives neither earlier-week figures nor the date UKMTO began tracking.

Six of 12

Half of the week's attacked vessels were hit on a single day, which indicates how concentrated the incidents were.

→ The Following Week

- UKMTO data places two tanker attacks on October 17 in the Gulf of Aden and the Central Arabian Gulf.
- A tug was struck in the strait on October 18.
- UKMTO reads the incidents as a sign that Iran means to sustain pressure on ships in transit and to make its presence felt along the main shipping lanes. This is UKMTO's interpretation, and the source states no cause for individual strikes.

→ Reporting Gaps and Traffic

- Strait traffic is still limited. Measured against weekly levels before the conflict, the 254 commercial transits UKMTO recorded from October 8 to 14 were roughly 70% lower.
- That transit window differs from the October 5 to 11 attack window, so the two figures describe separate periods.
- No pre-conflict transit figure is provided, nor are the vessel types, cargo types or any cost data.

LESSONS & ACTIONABLES

Companies with cargo routed through or near the Strait of Hormuz may want to ask carriers and forwarders whether routings and schedules have changed since UKMTO's October 18 advisory, which kept the regional threat assessment at severe. The source gives no freight-rate, insurance or surcharge data, so any cost effect would need confirming with carriers, forwarders and insurers directly.

Punctual Arrivals on the Asia-North America Lane Fell to About One in Four in September, and the Outlook Points to Harder Bookings

WHY IT MATTERS

Delivery dates built from published schedules on this lane carry more risk than the schedules themselves suggest, since the outlook finds the problem in how reliably carriers keep to them, not in the planned transit times.

26.9%
September 2026 on-time arrival rate, versus 33.9% in August

26.2 to 27.6 days
Planned transit times in the October outlook, against a 28-day recent baseline

26.8%
Latest weekly on-time reading

HIGHLIGHTS

- On-time arrivals on the lane fell from 33.9% in August to 26.9% in September. The latest weekly reading is 26.8%, and in that week the biggest outcome category was arrivals 8 days late or more.
- Weak service reliability is where the outlook places the uncertainty. Planned transits of 26.2 to 27.6 days sit below the 28-day recent baseline, and the outlook sees published schedules as adding no extra risk on transit times.
- On the forecast side, the outlook sees capacity tightening as its window closes, and it places booking acceptance risk far higher than its past average and climbing.

→ Observed Readings

- WiseTech Global released its October Ocean Freight Risk Outlook on October 9. It looks four weeks ahead across three east-west lanes, blending arrival performance, booking acceptance, carrier capacity plans and forecast demand, and Tradlinx's post addresses only the Asia-North America lane.
- Arriving at the port of discharge no later than the carrier's promised schedule counts as on time. Measured between the initial loading port and the initial discharge port, planned transit times are averaged across the whole lane.
- Waterside operating pressure in September rose as vessels were delayed at Asian ports. Later arrivals can slip, and effective service capacity can fall, when upstream calls run behind.

Roughly three in four

Listed transit times were shorter than the recent baseline, yet most shipments on this lane still arrived later than promised.

→ Forecast Items

- The outlook expects capacity to tighten near the end of its window because carriers are planning smaller deployments, not because demand is expected to rise. Since the real limit is how much capacity carriers offer, softer demand after China's Golden Week may not quickly make space any easier to secure.
- Rather than tracking the odds of confirmed cargo being rolled, the booking security risk indicator tracks the odds that booking requests are refused.
- The lane's top 10 carriers are far apart on booking acceptance risk as well as arrival performance. For that reason, the report recommends letting each carrier's own reliability decide how much buffer a delivery promise carries.
- Individual shipment outcomes fall outside what these indicators forecast, as the report treats its forward-looking risk measures as lane-level estimates.

→ Tradlinx's Own Shipment Data Across All Lanes

- Tradlinx drew on 508,055 ocean shipments, each with arrival confirmed by March 2026.
- For 4.99% of those shipments, the carrier ETA was off by 48 hours or more, and the mean absolute error within that group was 90.0 hours, a figure that counts the size of the miss whether the ETA ran ahead or behind.
- On 8.43% of shipments the carrier ETA field was empty, largely at transshipment ports.
- Keeping to the schedule originally promised is not what these figures measure. They track how accurate and complete ETAs are across all trade lanes, so they are a different measure from the 26.9% on-time rate.

→ Booking and Port Checks

- Even after a booking is confirmed, the carrier may change the vessel assigned to it and roll overbooked cargo to a later departure. At container level, a roll may show up as a vessel swap or as an expected loading window that passes with no loading event, though a similar gap can also come from slow reporting.
- The post's checklist covers sending requests in early under the allocations set out in contracts and confirming acceptance for sailings near the close of the outlook window, reviewing blank-sailing notices, sizing delivery buffers on each carrier's recent performance and the relevant port-pair schedule, matching loading milestones and the assigned vessel to the confirmed vessel and voyage, and flagging cargo, transshipment cargo in particular, whose ETAs are blank or have stopped updating.
- Tradlinx also points to the Vincent Thomas Bridge at Los Angeles-Long Beach closing on November 7, citing a Port of Los Angeles estimate that 8% of drayage truck traffic in the port complex crosses it. If the bridge sits on a container's usual truck route, the post suggests comparing the date it will actually be ready for collection with its pickup appointment, last free day and other route options.

LESSONS & ACTIONABLES

Importers on this lane may want to set delivery buffers carrier by carrier rather than from the lane average, make sure requests for the last sailings in the outlook window go in early and are confirmed as accepted, and compare the carrier's loading milestones and current vessel assignment with what each booking confirmation lists as the vessel and voyage.

Some Ocean Rates Turn Up After a Long Slide, but Cancellations and Security Incidents Keep Planning Uncertain

WHY IT MATTERS

Signals in this roundup differ by mode and route. Ocean index moves were split, with some routes up and others down, while air cargo pricing held stable as volumes eased, so a reading taken from one corridor may not hold for another.

44 of 713
Blank sailings expected in weeks 43 to 47, per Drewry's October 16 tracker

+3%
Drewry World Container Index move for the week to October 15

448,273 TEUs
Scheduled weekly capacity transiting Bab el-Mandeb on October 5

HIGHLIGHTS

- A 3% rise in Drewry's World Container Index for the week ending October 15 broke a streak of three weekly declines. For Shanghai-Rotterdam and Shanghai-Genoa, rates had fallen for thirteen weeks in a row before these first weekly gains.
- Drewry's tracker shows 44 of 713 planned sailings expected to be blanked across weeks 43 to 47, roughly 6% of voyages, compared with 34 of 713 in the previous reporting period.
- Since August 27, scheduled capacity across Bab el-Mandeb has doubled, yet steadier schedules and cheaper freight may be slow to follow, the roundup warns.

→ Rate Moves

- After a 1% dip the week before, Drewry's Intra-Asia Container Index dropped a further 3%.
- The durability of announced rate increases remains subject to added capacity and shifts in cargo demand, in the roundup's view.

Index or route (week to October 15)	Weekly move
Drewry World Container Index	+3%
Shanghai-Genoa	+7%
Shanghai-Rotterdam	+6%
Shanghai-Los Angeles	+3%
Shanghai-New York	-1%
Drewry's Intra-Asia Container Index	-3%

Thirteen weeks

A long run of falling rates on two Asia-Europe routes has just been interrupted, but the roundup does not claim that the reversal will hold.

→ Blank Sailings

- Drewry's October 16 tracker covers weeks 43 through 47, and 94% of sailings are currently expected to operate.
- Since Golden Week, carriers have been contending with swings in demand and in vessel availability, and the roundup places the rise in cancellations against that backdrop. On Asia-Europe trades, effective capacity is also being affected as more services return through the Suez Canal.
- When a given sailing is cancelled, the choice of departures and any cargo connections planned around it may both be affected.
- Planned cancellations are split across trades as shown below.

Trade	Share of planned cancellations
Asia-North Europe and Mediterranean	44%
Trans-Pacific eastbound	36%
Transatlantic	20%

→ Asia-Europe Reliability and Red Sea Capacity

- Planned vessel capacity on Asia-Europe still exceeds forecast demand, yet September on-time performance there fell to 9.9% from 22.9% in August, per WiseTech Global's October outlook.
- Long waits may still occur on arrival, in transit or at origin, even for a shipment whose booking has already been secured.
- Xeneta's update of October 16 puts weekly scheduled container capacity through the Bab el-Mandeb Strait at 448,273 TEUs on October 5, about 48% of the 930,679 TEUs offered each week in August 2023 ahead of the widespread rerouting around the Cape of Good Hope.
- Compared with the route around southern Africa, going through the Red Sea and Suez shortens the Asia-Europe distance. As more services come back, more vessel capacity can be freed up for use elsewhere in the network, because each rotation on the shorter routing takes less time.
- Where vessels get deployed still depends in part on regional security, congestion and service changes.

→ U.S.-Mexico Trucking

- U.S. Census Bureau data put bilateral trade at about $94.3 billion in August, a 26.75% rise on the prior year. Over the eight months through August 2026, the total was about $682.8 billion, up 17.5% year over year.
- Port Laredo stayed the busiest gateway for U.S. international trade, handling about $38.6 billion of two-way commerce in August.
- Unnamed transportation industry reporting, not the Census data, indicates that enforcement of the rules commercial drivers must meet, cabotage limits and English-language proficiency among them, is having an effect on how many drivers some cross-border operations can get.
- Transloading, the handoff of cargo from one carrier or set of equipment to another at or near the border, is drawing greater interest, some providers report. The trade lane, the facilities available and the cargo's requirements all bear on whether it is a good fit.

→ Air Cargo

- WorldACD's October 19 report, covering Week 41, finds worldwide pricing stable. Early-October holidays in China and other Asian markets were the main influence on a 1% week-over-week dip in worldwide chargeable weight, its third straight weekly fall.
- Tonnage worldwide was still 9% higher than a year earlier.
- Spot rates averaged $3.55 per kg worldwide, while the average across the whole market, spot and contract together, was unchanged at $3.13 per kg.
- Spot rates for Asia-Pacific origins dropped 3% on the week, reaching $4.83 per kg. Asia-Pacific volumes for Weeks 40 and 41 together ran 7% below the two weeks before.
- Air cargo on the affected connections faces added uncertainty, since recent attacks involving Saudi Arabian airport infrastructure have interrupted passenger flights.

→ Black Sea Security

- Merchant ships near Romania and Bulgaria had been targeted in a run of attacks before NATO's October 20 announcement of extra maritime surveillance. To bolster monitoring of the Black Sea, the announced measures include more drones, radar capabilities and maritime patrol aircraft.
- Chemical tankers off the Romanian coast are among the vessels attacked, and the roundup cites Reuters for crew members being missing as a result of the attacks.
- The roundup notes that neither a return to normal vessel operations nor an end to commercial shipping risk is established by these measures.

→ Company Guidance

- Before locking in time-sensitive shipments, Green Worldwide Shipping advises confirming capacity, cargo cutoffs and sailing schedules, and weighing each carrier's performance record together with confirmed allocations.

LESSONS & ACTIONABLES

Shippers may want to check booked ocean services against blank-sailing notices for weeks 43 to 47, confirm the transit time and actual routing of each Asia-Europe sailing, and avoid counting on returning Red Sea capacity to steady schedules or cut costs soon. On other corridors, they may also want to confirm driver availability for U.S.-Mexico road moves, review marine insurance cover, routing and carrier acceptance for any Black Sea cargo, and check air cargo space with each carrier for the origin and destination involved.



For inquiries & market intelligence

- 11490 Westheimer Rd Suite 970, Houston TX 77077, United States
- +1 832-341-1222
- info@webpackagingsolutions.com
- www.webpackagingsolutions.com

Sources DC Velocity, Supply Chain Brain, Tradlinx, Green Worldwide Shipping