EXECUTIVE MARKET BRIEF

Container Market Intelligence

Spot freight, lane direction, carrier capacity and network risk - distilled into one weekly view

MARKET CALL	FREIGHT	CAPACITY	RISK	MOMENTUM
BALANCED	BALANCED	FIRM	HIGH	STABLE

CARRIER-LEANING

Global spot freight: Balanced
China export freight: Firm
East-West lanes: Balanced
Capacity discipline: Firm

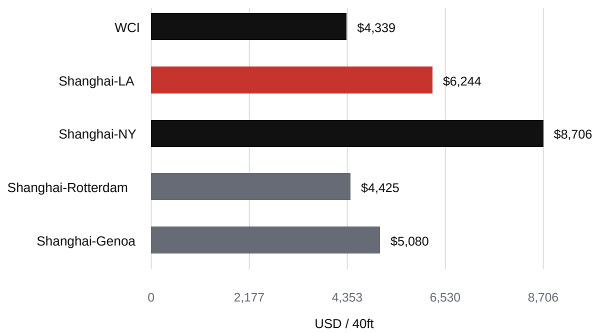
Updated 20 Aug 2026

EXECUTIVE READ

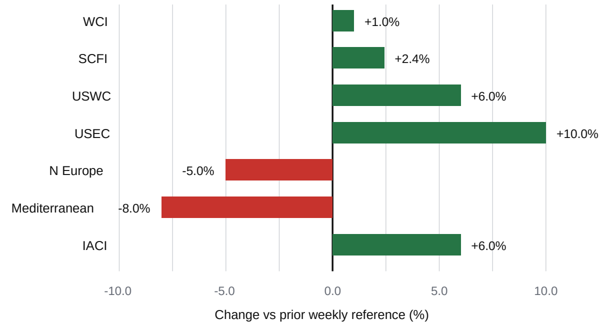
The Container market is balanced and carrier-leaning. WCI is up 1.0% and SCFI is up 2.4%. Transpacific lanes read +6.0% USWC and +10.0% USEC, while Europe / Med read -5.0% Rotterdam and -8.0% Genoa. Blank sailings remain firm at 7.0%, while PortWatch container calls are -4.7% versus the prior window.

FREIGHT & CAPACITY DASHBOARD

CURRENT FREIGHT LEVELS



WEEKLY CHANGE



MARKET DRIVERS

Driver	Read	Why it matters
Global Spot Freight Strength	Balanced	WCI is $4,339/40ft, +1.0% week on week.
China Export Freight Strength	Firm	SCFI is 3,355.2, +2.4% and confirms China-origin pricing.
Major East-West Lane Strength	Balanced	Transpacific and Asia-Europe lane divergence defines the route mix behind the composite.
Capacity Discipline / Blank Sailings	Firm	A 7.0% cancellation rate measures active carrier capacity management.
Network Absorption / Diversions	Balanced	Network absorption is 99.4 versus its prior comparison baseline.
Container Port / Network Activity	Soft	PortWatch container calls are -4.7% versus the comparison window.

WEEKLY TAKEAWAYS

FREIGHT

WCI, SCFI and named East-West lanes define the prompt pricing layer.

CAPACITY

Blank sailings and IACI keep carrier capacity discipline and regional pricing in focus.

NETWORK

Port activity and routing disruptions determine how nominal capacity translates into usable capacity.

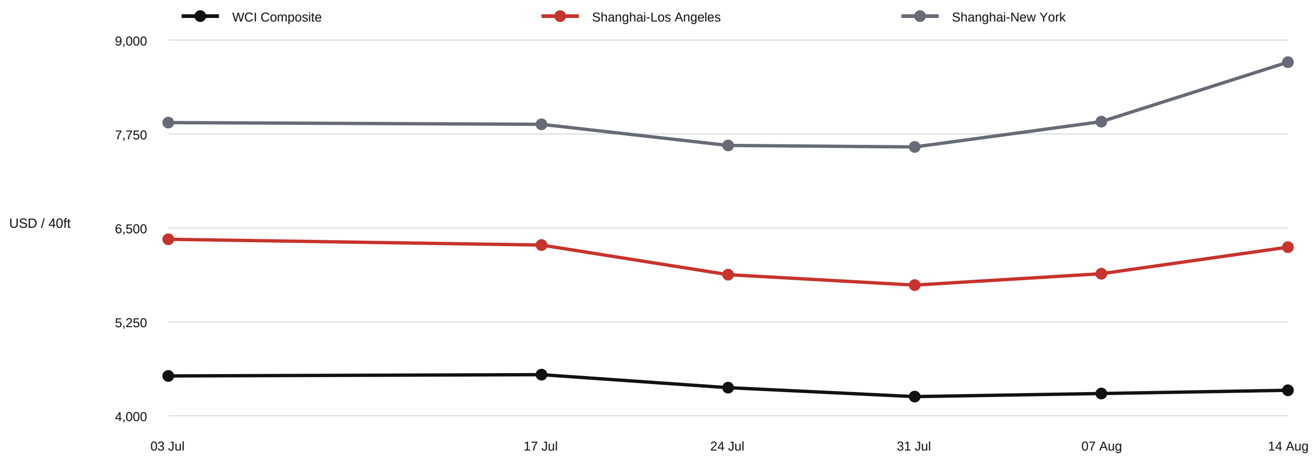
CONTAINER FREIGHT & CAPACITY DEEP DIVE

Freight & Capacity

Global spot benchmarks, East-West lanes and carrier capacity discipline

Drewry WCI and named East-West spot lanes define the immediate public freight layer. The route picture can diverge materially beneath the composite, so the report keeps Transpacific and Asia-Europe lanes visible alongside SCFI and IACI.

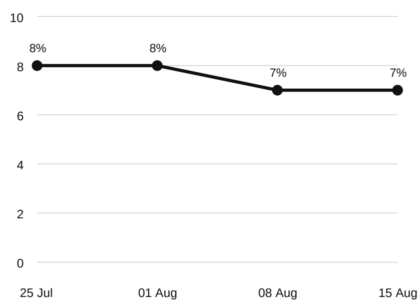
WCI & TRANSPACIFIC EVOLUTION



LANE READ

Lane	Latest	Interpretation
Shanghai-Los Angeles	$6,244/40ft	Balanced; +6.0% vs prior week.
Shanghai-New York	$8,706/40ft	Balanced; +10.0% vs prior week.
Shanghai-Rotterdam	$4,425/40ft	-5.0% vs prior week.
Shanghai-Genoa	$5,080/40ft	-8.0% vs prior week.

BLANK SAILING RATE - LAST 4 WEEKS



CAPACITY POSITIONING

Indicator	Latest	Interpretation
Blank sailings	7.0%	Firm capacity discipline; carrier supply action remains active.
Network absorption	99.4 index	Balanced; effective network capacity context.
Container port calls	1,179 calls/day [-4.7%]	Soft current network activity versus the prior window.
Intra-Asia IACI	$1,028/40ft [+6.0%]	Firm regional freight pulse outside the main East-West trades.

COMMERCIAL READ

The global spot tape is balanced rather than uniformly strong. Transpacific and Asia-Europe lane direction, China-export freight and blank-sailing discipline determine whether carrier pricing power broadens or fades.

DESK VIEW

Near-term pricing power depends on whether stronger lanes broaden into the composite and whether carriers maintain capacity discipline. A recovery in port/network activity would strengthen the carrier case; softer WCI/SCFI alongside fewer cancellations would shift leverage toward shippers.

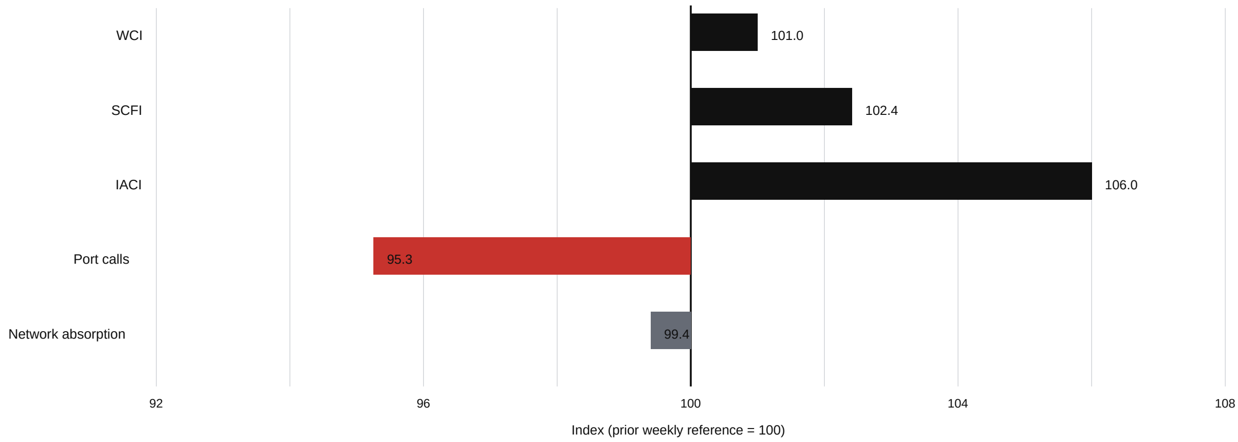
CONTAINER DEMAND & NETWORK

Demand & Network

Weekly lane divergence and network activity with slower monthly demand anchors

The prompt Container layer is driven by weekly freight, lane and network observations. CTS physical volume data and Sea-Intelligence schedule reliability remain monthly confirmation rather than being presented as weekly demand signals.

PROMPT CONTAINER PULSE



FLOW TABLE

Indicator	Latest	Prior	Change
WCI composite	$4,339/40ft	$4,296/40ft	+1.0%
SCFI composite	3,355.2	3,276.1	+2.4%
Intra-Asia IACI	$1,028/40ft	$970/40ft	+6.0%
PortWatch container calls	1,179	1,237	-4.7%

DEMAND READ

Prompt pricing and network signals are assessed together. WCI, SCFI and IACI provide freight momentum while PortWatch container calls show the current network-activity layer. Divergence between those signals prevents a single route rally from becoming a broad market call.

MONTHLY & STRUCTURAL ANCHORS

Indicator	Latest	Period	Read / use
Global container volume MoM	-1.7%	Jun 2026	Monthly physical-demand momentum anchor.
Global YTD volume YoY	+5.2%	Jun 2026	Year-to-date demand growth context.
YTD liftings	98.4m TEU	Jun 2026	Physical global container-volume level.
CTS global price index	86.0	Jun 2026	Slower price context; secondary to weekly WCI/SCFI.
Schedule reliability	62.6%	Jun 2026	Operational efficiency / capacity-absorption anchor.
Late-vessel delay	5.31 days	Jun 2026	Average delay context for effective capacity.
Source timing	Published on source schedule	Monthly	Kept at actual source period; not estimated forward.

DESK VIEW

The report is designed to move every week from freight, lane, capacity and network signals. Monthly CTS and schedule-reliability data confirm the backdrop but do not override the weekly market read.

RISK & FORWARD VIEW

Risk, Capacity & 7-Day Outlook

Where disruption, carrier capacity action and routing can alter effective container supply

RISK & ROUTING MATRIX

Severity	Area	Market transmission	Commercial implication
Monitored	Network / routing	Military exercise warning - North Pacific, Hokkaido	May alter effective capacity, transit time or network reliability.
Monitored	Network / routing	Fire reported - Strait Of Hormuz	May alter effective capacity, transit time or network reliability.
Monitored	Network / routing	Navigation restriction - Red Sea Saudi Arabia, Jeddah Islamic Port	May alter effective capacity, transit time or network reliability.

FORWARD WATCH

WHAT TO WATCH

- Next WCI and SCFI assessments and whether route strength broadens.
- Blank sailing rate and material capacity withdrawals or service adjustments.
- Shanghai-Rotterdam / Genoa for signs that Asia-Europe weakness stabilises.
- PortWatch container calls and network absorption for a demand / utilisation turn.
- Suez, Panama, strikes and severe-weather events; CTS / GLP as monthly confirmation.

SCENARIO FRAME

BULL WCI/SCFI and East-West lanes firm together while blank sailings keep effective capacity tight.

BASE Weekly lane divergence persists and capacity discipline prevents a broad freight reversal.

BEAR WCI/SCFI soften, blank sailings ease and weak port activity translates into looser effective capacity.

7-DAY BASE CASE | BALANCED / CARRIER-LEANING

The seven-day base case remains balanced and carrier-leaning. Weekly WCI/SCFI, East-West lanes, blank-sailing discipline, port activity and routing risk remain the primary direction setters. The next directional break depends on whether carrier capacity actions keep effective supply tight enough to sustain freight gains.

CATALYST GRID

UPSIDE TO CARRIER PRICING

Broader WCI/SCFI gains; stronger Asia-Europe lanes; more blank sailings; persistent routing friction.

DOWNSIDE TO CARRIER PRICING

Weaker WCI/SCFI; fewer cancellations; softer port activity; easing network disruption.

MONITOR / NEUTRAL

East-West divergence; IACI follow-through; PortWatch calls; CTS demand; schedule reliability.

SOURCES & METHODOLOGY

This report combines Drewry World Container Index composite and named East-West lane rates, Drewry Intra-Asia Container Index and cancelled-sailing data; Shanghai Shipping Exchange SCFI; IMF PortWatch container activity; ViewShipping network/routing layers; CTS monthly container demand; and Sea-Intelligence schedule reliability. Weekly/current signals dominate the headline. Monthly observations retain their actual reference period. Announced GRIs, PSS and surcharges are not treated as achieved spot freight rates.

Data cut: Drewry / lane data through 13 Aug 2026 | SCFI / blank sailings / PortWatch through 14 Aug 2026 | routing state through 20 Aug 2026 | CTS and Sea-Intelligence through Jun 2026.