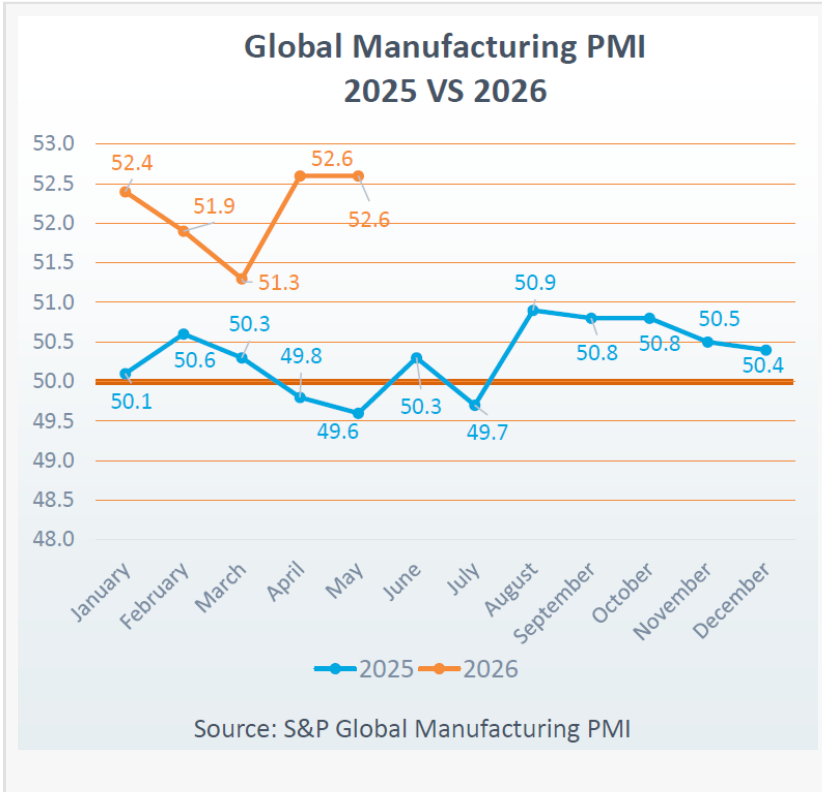
Dimerco’s July Freight Report Highlights Tight Capacity Across Asia as AI Demand Persists

Dimerco’s July report finds AI demand, tight capacity and resilient US imports keeping Asia-Pacific freight markets under pressure through peak season.



TAIPEI, TAIWAN, July 1, 2026 /EINPresswire.com/ -- Dimerco Express Group has released its July 2026 Asia-Pacific Freight Report, showing a freight market still shaped by high-tech demand, tight capacity and uneven disruption rather than a clean, broad-based peak-season recovery.

The report points to resilient manufacturing activity, with the Global Manufacturing PMI holding at 52.6 in May for the second straight month and remaining above 50 for a tenth consecutive month. Taiwan's manufacturing PMI rose to 56.1, supported by semiconductor, AI server and electronics demand, while South Korea, Japan, Vietnam and India also remained in expansion.

"The clearest signal this month is out of Taiwan. AI-driven volumes have filled the TPE transit hub to capacity, and until that demand eases, space and rates across US and regional lanes will stay under real pressure," said Kathy Liu, VP, Global Sales and Marketing, Dimerco Express Group.

Air freight: Taiwan leads the capacity squeeze

Dimerco's July report shows airfreight demand staying high across Asia, with Bangkok and Singapore among the strongest intra-Asia destinations. The short-lived frontloading of US-bound cargo that began in early June has already normalized, but capacity remains tight where AI, semiconductor and high-value electronics cargo is moving.

Taiwan-US airfreight remains one of the tightest corridors, with direct and indirect capacity constrained and rates rising. Taipei-Europe capacity is more stable, but regional lanes from Taiwan to Penang, Singapore, Bangkok and Chennai are also under pressure. South Korea is seeing tight conditions tied to China transshipment cargo, e-commerce, HBM semiconductor shipments and equipment moving through Incheon.

Terminal congestion is adding another layer of difficulty. Bangkok and Manila have not fully recovered, extending door-to-door lead times. In the Philippines, congestion at NAIA and limited staging space have left some cargo releases taking more than a week.

Ocean freight: US imports keep space tight

Manufacturing Purchasing Managers Index (PMI)

	2025								2026				
	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Global	49.6	50.3	49.7	50.9	50.8	50.8	50.5	50.4	52.4	51.9	51.3	52.6	52.6
USA	52.0	52.9	49.8	53.0	52.0	52.5	52.2	51.8	50.9	51.6	52.3	54.5	55.1
China	48.3	50.4	49.6	50.5	51.2	50.6	49.9	50.1	50.3	52.1	50.8	52.2	51.8
Taiwan	48.6	47.2	46.2	47.4	46.8	47.7	48.8	50.9	51.7	55.2	53.3	55.3	56.1
Hong Kong	49.0	47.8	49.2	50.7	50.4	51.2	52.9	51.9	52.3	53.3	49.3	48.6	50.4
Japan	49.4	50.1	48.9	49.7	48.5	48.2	48.7	50.0	51.5	53.0	51.6	55.1	54.5
S. Korea	47.7	48.7	48.0	48.3	50.7	49.4	49.4	50.1	51.2	51.1	52.6	53.6	54.8
Singapore	49.7	50.0	49.9	50.0	50.1	50.0	50.2	50.3	50.5	50.6	50.5	50.7	51.0
Vietnam	49.8	48.9	52.4	50.4	50.4	54.8	53.8	53.0	52.5	54.3	51.2	50.5	52.8
Malaysia	48.8	49.3	49.7	49.9	49.8	49.5	50.1	50.1	50.2	50.0	50.7	51.6	49.9
Philippines	50.1	50.7	50.9	50.8	49.9	50.1	47.4	50.2	52.9	54.6	51.3	48.3	50.8
Indonesia	47.4	46.9	49.2	51.5	50.4	51.2	53.3	51.2	52.6	53.8	50.1	49.1	50.0
Thailand	51.2	51.7	51.9	52.7	54.6	56.6	56.8	57.4	52.7	53.5	54.1	52.7	52.6
India	57.6	58.4	59.1	59.3	57.7	59.2	56.6	55.0	55.0	56.9	53.9	54.7	55.0
Australia	51.0	50.6	51.3	53.0	51.4	49.7	51.6	51.6	52.3	51.0	49.8	50.7	50.7

Air Freight	TO ASIA		TO EUR		TO USEC		TO USWC	
	Capacity	Rate	Capacity	Rate	Capacity	Rate	Capacity	Rate
East China	Upturn	Stable	Upturn	Stable	Soft	Stable	Soft	Stable
North China	Upturn	Stable	Upturn	Stable	Upturn	Stable	Upturn	Stable
South China	Upturn	Stable	Upturn	Stable	Upturn	Stable	Upturn	Stable
Hong Kong	Tight	Stable	Upturn	Stable	Upturn	Stable	Upturn	Stable

Ocean Freight	TO ASIA		TO EUR		TO USEC		TO USWC	
	Capacity	Rate	Capacity	Rate	Capacity	Rate	Capacity	Rate
East China	Upturn	Stable	Tight	Rising	Tight	Rising	Tight	Rising
North China	Upturn	Stable	Upturn	Rising	Upturn	Rising	Upturn	Rising
South China	Upturn	Stable	Upturn	Rising	Upturn	Rising	Upturn	Rising
Hong Kong	Upturn	Stable	Upturn	Rising	Upturn	Rising	Upturn	Rising

On the ocean side, strong US import volumes have kept transpacific space tight and rates firm as peak season builds. Dimerco advises shippers to pre-book three to four weeks ahead on key transpacific lanes, while July tariff changes remain a wildcard for demand patterns.

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AI-driven demand has filled Taiwan’s transit hub to capacity, and until that eases, space and rates across US and regional air freight lanes will remain under pressure.”

Kathy Liu, VP of Global Sales and Marketing at Dimerco Express Group

"US import demand has stayed stronger than most expected, and that's keeping space tight right through peak season. The difference this month is on cost. If the Strait of Hormuz stays calm, we may finally see fuel pressure ease rather than build," said Ted Chen, Director - Ocean Freight, Global Sales and Marketing, Dimerco Express Group.

The report shows ocean pressure across East China, South China, Taiwan, South Korea and Southeast Asia, especially on long-haul lanes to the US and Europe. Carriers continue to manage capacity through blank sailings, while GRIs and

Peak Season Surcharges are keeping rates firm. In Europe, Rotterdam congestion and inland rail disruption around Hamburg and Bremerhaven are affecting reliability.

What shippers should watch in July

Dimerco identifies three main planning risks for July: the provisional US-Iran ceasefire, monsoon-season cargo handling risk, and peak-season frontloading that may pull demand forward rather than signal a sustained recovery.

The Strait of Hormuz has reopened toll-free under a preliminary ceasefire framework, easing the immediate fuel threat. Still, negotiations remain unresolved and vessel traffic remains below pre-conflict levels. Dimerco recommends that shippers keep routing and surcharge budgets flexible.

The Southwest Monsoon is also intensifying across Southeast Asia and South Asia. Dimerco advises shippers to build buffer time into monsoon-exposed lanes and use moisture protection such as shrink-wrapping and barriers for sensitive cargo.

Practical recommendations

Dimerco recommends early booking on high-demand corridors, especially Thailand, Malaysia, Taiwan and South Korea air lanes. China-Europe rail remains a viable alternative where air and ocean space is under pressure, with transit times from major China origins to Europe ranging from roughly 19 to 27 days. Shippers should also account for congestion at Bangkok and Manila, monitor Middle East negotiations, and avoid assuming that July's strength will continue unchanged through late Q3.

***** Download the complete July 2026 Asia-Pacific Freight Report *****

About Dimerco Express Group

Dimerco Express Group integrates air and ocean freight, trade compliance, and contract logistics services to make global supply chains more effective and efficient. Founded in Taiwan in 1971, Dimerco connects Asia’s manufacturing hubs with North America and Europe through a robust network of 150+ offices and 200+ strategic partner agents.

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