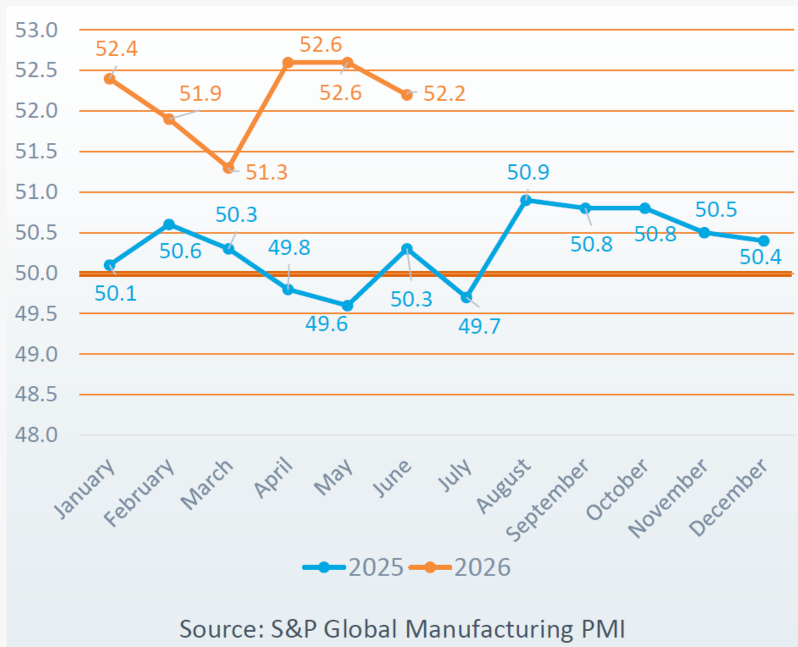
EINPRESSWIRE

Dimerco August Freight Report: Peak Season Tightens Capacity as AI Demand Diverges From Softer Consumer Volumes

Global manufacturing expands for an 11th month, while Taiwan and Korea air lanes remain tight and transpacific rates ease from July highs



Global Manufacturing PMI 2025 VS 2026

TAIPEI, TAIWAN, August 3, 2026 /EINPresswire.com/ -- Dimerco Express Group has released its August 2026 Asia Pacific Freight Report, highlighting a freight market increasingly divided between strong AI and semiconductor demand and softer consumer and e-commerce volumes.

The Global Manufacturing PMI reached 52.2 in June, marking an 11th consecutive month of expansion, although growth eased from May's 50-month high of 52.7. Manufacturing remained strong in several key markets, including Taiwan at 55.2, Japan at 54.8, India at 54.2 and the United States at 53.9.

AI and Semiconductor Exports Keep Northeast Asia Tight

Taiwan airfreight capacity remains tight with rising rates to Asia and both US coasts, driven by continued demand for AI servers, semiconductors and other high-tech products. Europe-bound capacity is more balanced, with stable rates.

South Korea is seeing similar airfreight pressure. Capacity is tight to Asia and the US, while rates are rising across all major corridors. Dimerco reports that load factors on Asia-US lanes have reached approximately 90%, with AI and semiconductor shipments replacing e-commerce as the primary capacity driver.

"What we're seeing is a market split in two. AI demand out of Taiwan just keeps climbing, while the e-commerce base that carried Europe is gone with the de minimis change," said Kathy Liu, VP, Global Sales and Marketing at Dimerco Express Group.

Greater China presents a softer picture. Air capacity from North China and Hong Kong to the US is soft, with rates falling, while South China has ample capacity and stable pricing. Ocean rates from China to the US are also trending downward as the earlier tariff-driven cargo rush fades.

Manufacturing Purchasing Managers Index (PMI)	2025							2026					
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Global	50.3	49.7	50.9	50.8	50.8	50.5	50.4	52.4	51.9	51.3	52.6	52.7	52.2
USA	52.9	49.8	53.0	52.0	52.5	52.2	51.8	50.9	51.6	52.3	54.5	55.1	53.9
China	50.4	49.6	50.5	51.2	50.6	49.9	50.1	50.3	52.1	50.8	52.2	51.8	51.7
Taiwan	47.2	46.2	47.4	46.8	47.7	48.8	50.9	51.7	55.2	53.3	55.3	56.1	55.2
Hong Kong	47.8	49.2	50.7	50.4	51.2	52.9	51.9	52.3	53.3	49.3	48.6	50.4	52.0
Japan	50.1	48.9	49.7	48.5	48.2	48.7	50.0	51.5	53.0	51.6	55.1	54.5	54.8
S. Korea	48.7	48.0	48.3	50.7	49.4	49.4	50.1	51.2	51.1	52.6	53.6	54.8	52.1
Singapore	50.0	49.9	50.0	50.1	50.0	50.2	50.3	50.5	50.6	50.5	50.7	51.0	51.3
Vietnam	48.9	52.4	50.4	50.4	54.8	53.8	53.0	52.5	54.3	51.2	50.5	52.8	51.8
Malaysia	49.3	49.7	49.9	49.8	49.5	50.1	50.1	50.2	50.0	50.7	51.6	49.9	50.7
Philippines	50.7	50.9	50.8	49.9	50.1	47.4	50.2	52.9	54.6	51.3	48.3	50.8	50.9
Indonesia	46.9	49.2	51.5	50.4	51.2	53.3	51.2	52.6	53.8	50.1	49.1	50.0	46.9
Thailand	51.7	51.9	52.7	54.6	56.6	56.8	57.4	52.7	53.5	54.1	52.7	52.6	53.6
India	58.4	59.1	59.3	57.7	59.2	56.6	55.0	55.0	56.9	53.9	54.7	55.0	54.2
Australia	50.6	51.3	53.0	51.4	49.7	51.6	51.6	52.3	51.0	49.8	50.7	50.7	51.5

Source: S&P Global PMI

Asia Pacific Manufacturing PMI

Southeast Asia Enters Peak Season With Uneven Capacity

Thailand remains one of the region's tightest airfreight markets, with capacity tight and rates rising across Asia, Europe and both US coasts. Singapore is experiencing backlog conditions to Europe, while Malaysia's KUL and PEN gateways remain tight on Asia and US-bound lanes.

India also faces rising airfreight pressure, with tight capacity to Europe and North America. Australia runs counter to the regional trend, with soft capacity and stable air rates across all major lanes.

Ocean freight from Southeast Asia is strengthening as peak-season demand builds. Malaysia, Indonesia and India are seeing tight capacity and rising rates on several Europe and North America routes. Carriers are also introducing peak-season surcharges and general rate increases as vessel utilization rises.

> "
> The frontloading wave has passed its peak. Transpacific rates are coming off their highs, but fuel and canal surcharges mean cheaper space will not mean cheaper shipping."
>
> *Ted Chen, Director of Ocean Freight, Global Sales and Marketing, Dimerco*

Frontloading Fades, but Ocean Cost Floors Remain High

The report shows that the frontloading wave ahead of [US tariff deadlines] has passed its peak. Transpacific rates are declining from July highs, even as seasonal retail replenishment keeps vessel space tight at major gateways.

“The frontloading wave has passed its peak. Transpacific rates are coming off their highs and Europe looks set to follow,” said Ted Chen, Director - Ocean Freight, Global Sales and Marketing at Dimerco Express Group. “But the cost floor isn’t moving: fuel and canal surcharges won’t fall with demand, so expect cheaper space, not cheaper shipping.”

Ocean Freight	TO ASIA		TO EUR		TO USEC		TO USWC	
	Capacity	Rate	Capacity	Rate	Capacity	Rate	Capacity	Rate
The Philippines	Soft	Rising	Upturn	Rising	Upturn	Rising	Upturn	Rising
Malaysia (KUL)	Upturn	Stable	Tight	Rising	Tight	Rising	Tight	Rising
Malaysia (PEN)	Upturn	Stable	Tight	Rising	Tight	Rising	Tight	Rising
Vietnam	Soft	Stable	Upturn	Rising	Upturn	Rising	Upturn	Rising
Thailand	Upturn	Stable	Tight	Rising	Tight	Falling	Tight	Falling
Singapore	Soft	Stable	Soft	Stable	Soft	Falling	Soft	Falling
Indonesia	Soft	Stable	Tight	Rising	Tight	Rising	Tight	Rising
Australia	Upturn	Rising	Upturn	Rising	Upturn	Rising	Upturn	Rising
India	Soft	Stable	Upturn	Rising	Tight	Rising	Tight	Rising

Key for available space	SOFT	UPTURN	TIGHT	BACKLOG	SERIOUS
	Supply is more than demand	Market is picking up, but demand of space can still be met by current supply.	Space Gets tight. Pre-arrangement of space is needed.	Backlog of 1-2 days is found in the market.	Space demand critical, turndown of booking found. Consider alternatives

Freight Market Forecast For August - Southeast Asia, India & Australia Market

Dimerco notes that elevated fuel expenses, potential Panama Canal surcharges and Middle East routing risks may prevent total shipping costs from falling in line with base freight rates.

Europe and North America Face Different Bottlenecks

European airfreight to Asia is soft with stable rates following changes to the EU’s de minimis exemption. However, air rates from the Netherlands, Germany and the United Kingdom to both US coasts are rising.

The ocean market is moving in the opposite direction. Transatlantic capacity is at backlog levels from all three European markets, with rising rates and elevated rollover risk caused by vessel bunching in Rotterdam and infrastructure constraints in Hamburg.

North America is also experiencing peak-season pressure. Airfreight is at backlog levels from Chicago to Asia and Europe, while New York-to-Europe capacity is classified as serious. Ocean capacity from Los Angeles is in backlog to both Asia and Europe, while New York-to-Europe space is also at serious levels.

Southern Mexico remains another pressure point, with ocean capacity to Europe and the US East Coast classified as serious and rates rising.

Dimerco Recommends Early Booking and Flexible Routing

Dimerco recommends early booking on air lanes from Taiwan, South Korea, Malaysia, Thailand and Singapore. For ocean freight, shippers should secure space one to two weeks ahead for intra-Asia movements and two to three weeks ahead for Europe and North America.

[China-Europe rail] remains an alternative, with transit times ranging from 16 to 27 days. However, capacity varies significantly by route, with Chengdu-Tilburg space critically limited and more flexible spot opportunities available from Chongqing.

Shippers should also prepare for monsoon and typhoon disruption, congestion at regional hubs and continued volatility in fuel and war-risk surcharges.

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

About Dimerco Express Group

Founded in Taiwan in 1971 and listed on the Taipei Exchange (5609), Dimerco Express Group is a top Asia-based freight forwarder connecting Asia with the world through international air freight, ocean freight, contract logistics and supply chain solutions. Dimerco operates a global network of over 300 service locations connected on a cloud-based digital logistics platform. Learn more at https://www.dimerco.com.

For media enquiries, contact:

Gitte Willemsens
Pesti Group
media@dimerco.com
Visit us on social media:
LinkedIn
Facebook
YouTube
X
