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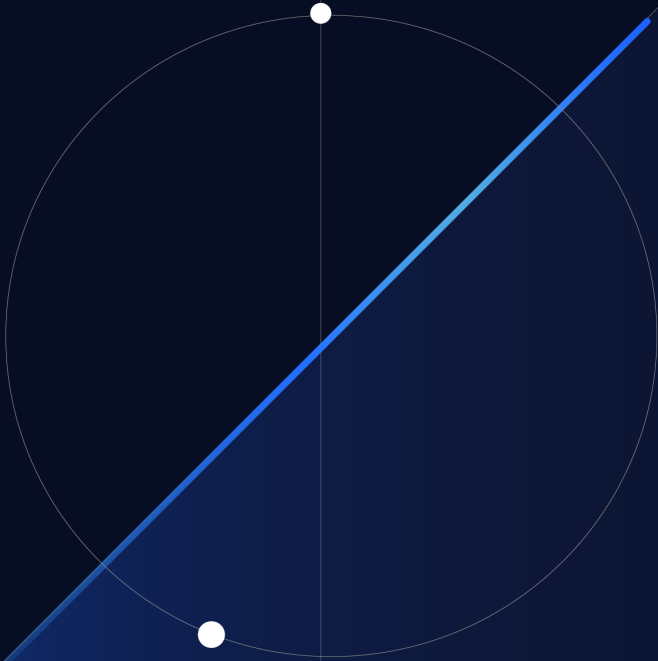
January 2026 | Container Shipping Trends

The run up to Chinese Lunar New Year is bumpy

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Xeneta Ocean Container Shipping Market Update – 29.01.26

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Major carrier reverses decision on Red Sea return – analysts warn unpredictability could be toxic for ocean container supply chains

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Jan 13

MAERSK DENVER is about to complete a Suez Canal transit for Maersk, more will follow

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Jan 9

Xeneta Schedule Reliability Scorecard - 2025 Year in Review - Global

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Dec 1

What is a Carrier Scorecard?

Click the link below to learn more: **A Practical Guide for Modern Ocean Procurement**
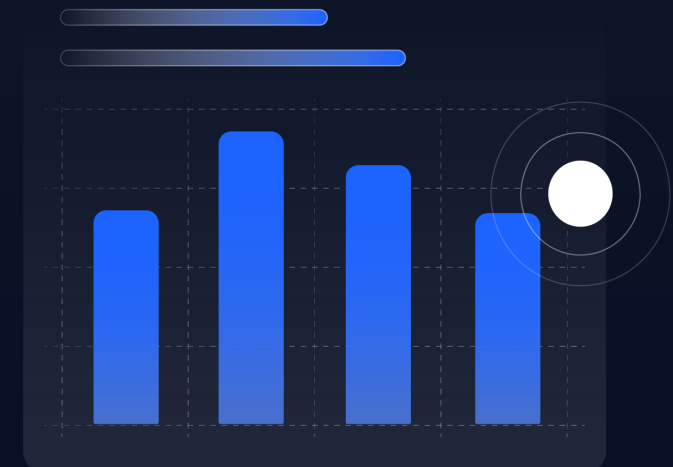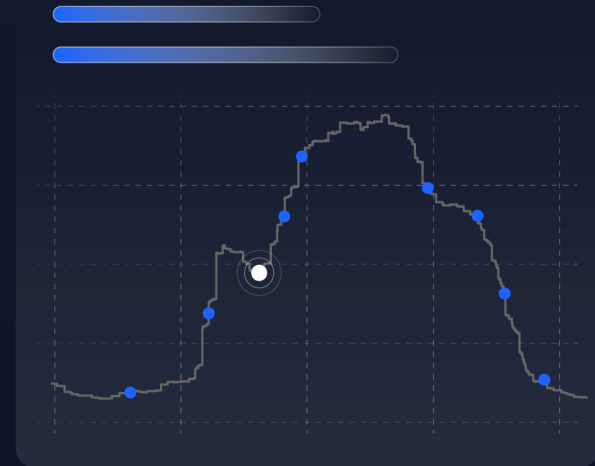
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Red Sea Return: What It Means for 2026 Container Shipping Contract Rates

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Weekly Market Update (Week 5)
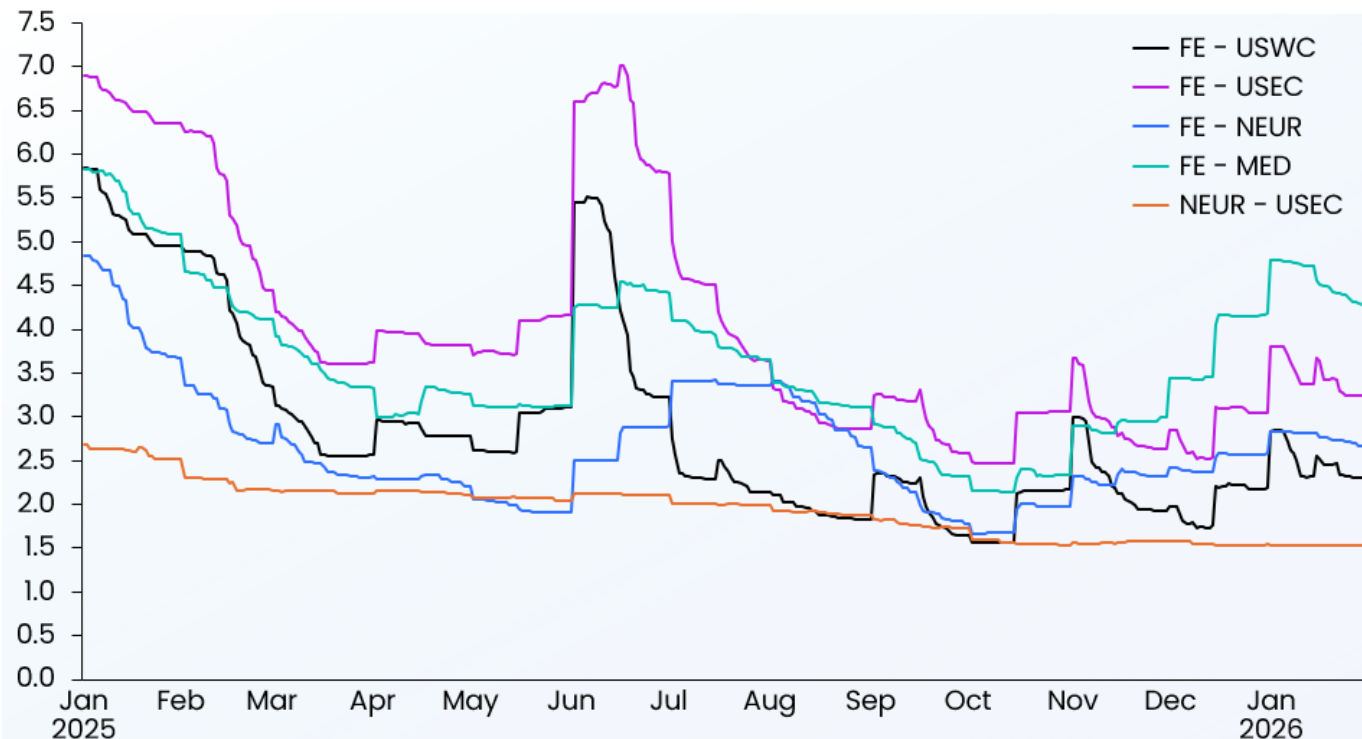
→

(available in Platform)

Xeneta's Weekly Container Shipping Market Update

Freight rates - volatility persists

Daily spot rates on major trades
kUSD per FEU

Legend:
- FE – USWC
- FE – USEC
- FE – NEUR
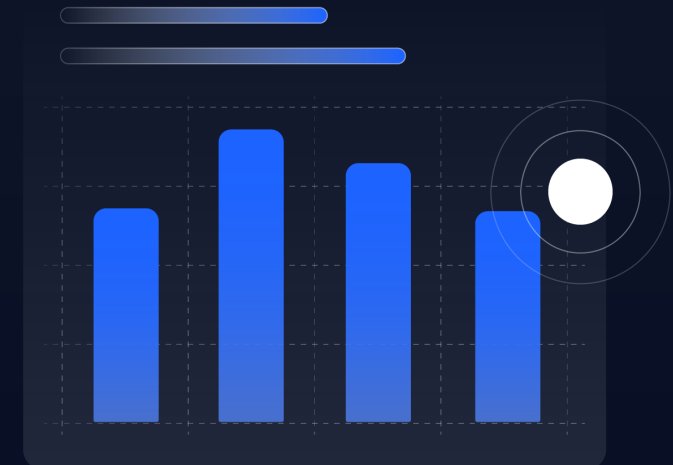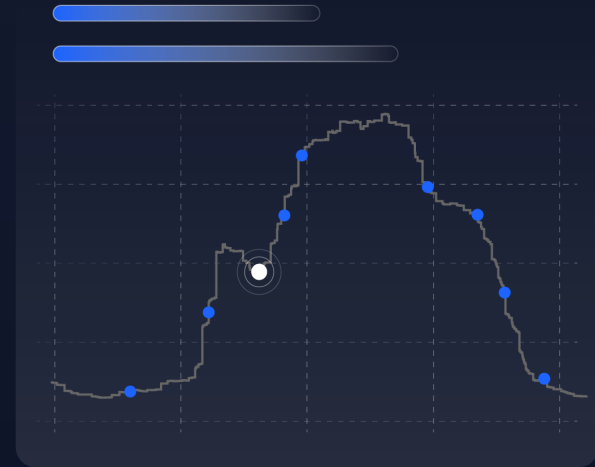- FE – MED
- NEUR – USEC

Source: Xeneta

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One final jump by early January came about.

The peak seems to have been reached for the European inbound trade lanes.

Volatility remains into the US – East and West coasts.

Read the latest weekly market update now (also available in the Xeneta platform).

Monthly Specials!

→

2026 marks the beginning of new 'delivery-tsunami'

Fleet growth of 3.3% in 2026 – rising in 2027 and 2028

Deliveries and expected deliveries of container ships
Jan 2026, mTEU

Source: Xeneta, Clarksons

Future fleet growth is set to go higher from 2026 onwards.

Carriers focusing more on owned tonnage rather than charter-in from non-operating owners to manage cost.

Read more about the 'supply side' of the container shipping market in Xeneta's 2026 Ocean Outlook.

Current orderbook equals all active ships built in 2010 or earlier
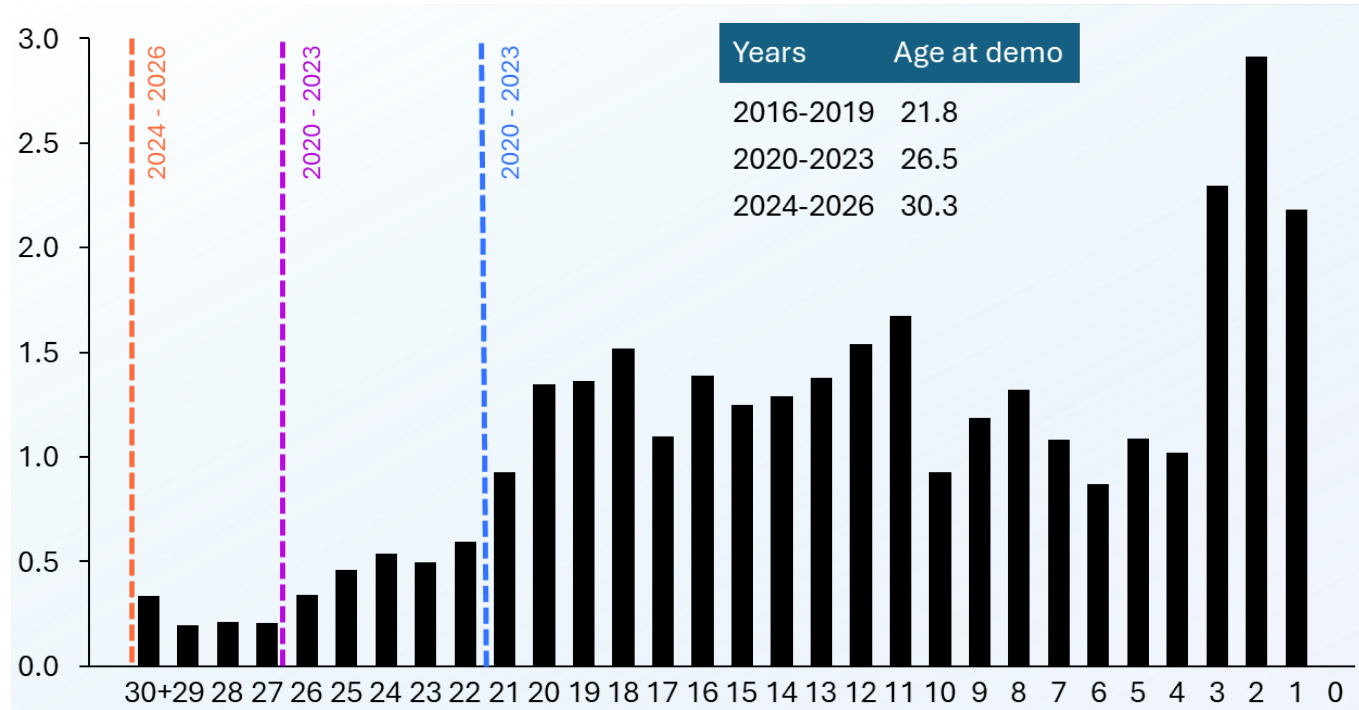
Fleet growth of 3.3% in 2026 – rising in 2027 and 2028

Breakdown of container shipping fleet and average age at demolition
Jan 2026, mTEU

Years	Age at demo
2016-2019	21.8
2020-2023	26.5
2024-2026	30.3

Source: Xeneta, Clarksons

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As carriers eventually return to Red Sea transits, demolition of those ships no longer competitive will begin.

The 2.5m TEU currently deployed to secure supply chains round Cape of Good Hope won't be needed upon a largescale return.
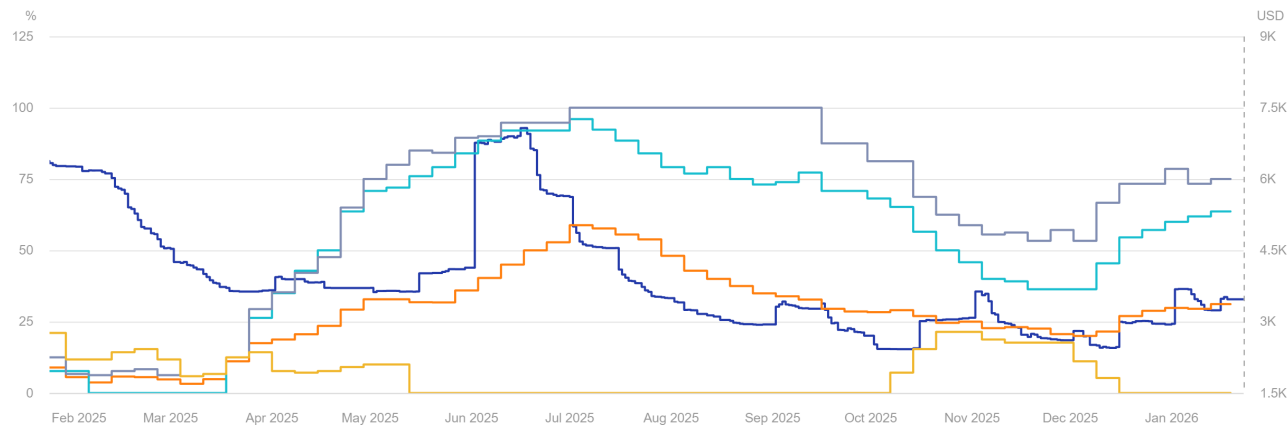
Their destiny is uncertain, but demolition is *only one tool* for managing market balance.

Read more about the 'supply side' of the container shipping market in Xeneta's 2026 Ocean Outlook.

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14

Gemini staging a comeback for reliability into the US West Coast

Meanwhile MSC drops

Market Average[+] for Short-term[+] contracts, 40' DC[+] container type and THC Destination[+] from Shanghai[+] to New York City/Newark, NY&NJ[+] trade lane in comparison with Hapag-Lloyd, Maersk, MSC[+] carriers Schedule Reliability for Shanghai to New York City/Newark, NY&NJ, Percent.[+]

Jan 22, 2025 - Jan 22, 2026

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- ■ Market rate — average, port level 👁
- ■ Reliability — average, port level
- ⊞ Carrier reliability — average, port level ⌃
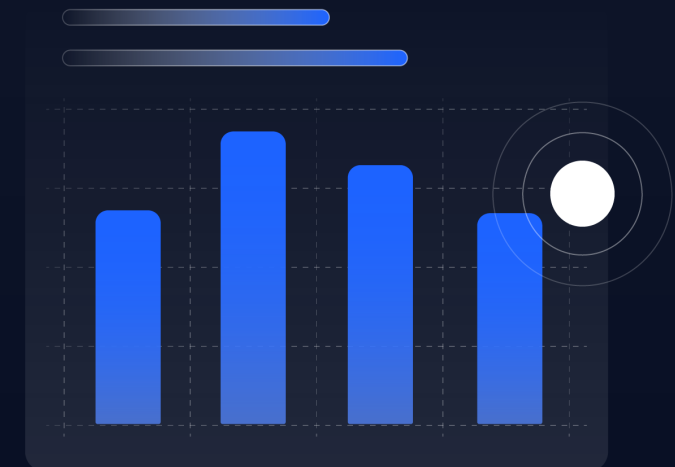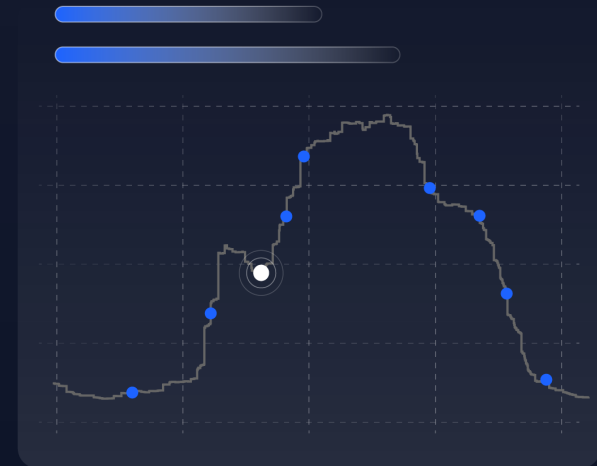 - ■ Hapag-Lloyd ✕
  - ■ Maersk ✕
  - ■ MSC ✕

2026 Ocean Outlook

Focus on the factors that will impact the 2026 Container shipping market

- **Ask your CSM about it and watch the On-Demand webinar now:**
- https://www.xeneta.com/events/webinar/2026-ocean-outlook

What's being shipped?

Current Demand Trends

→

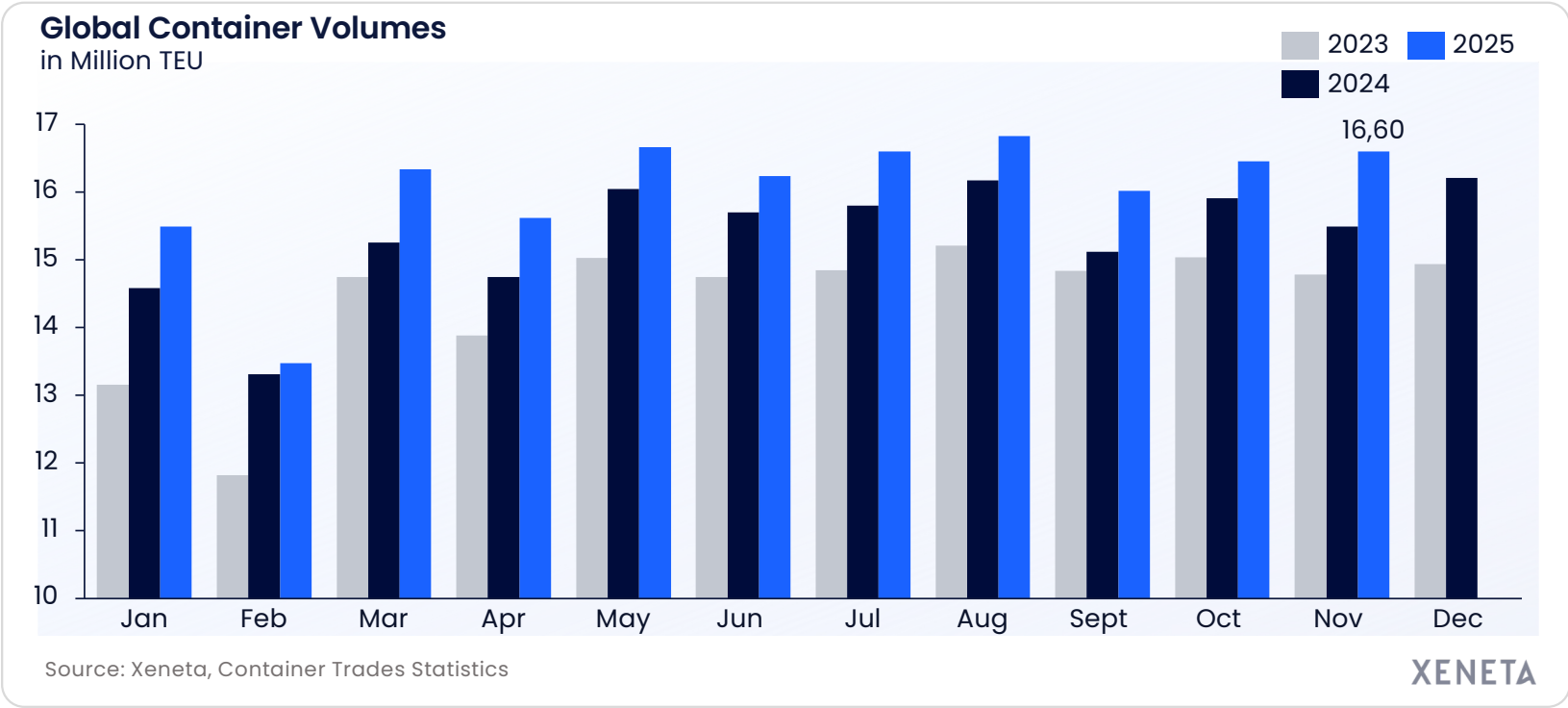XENETA

November 2025: Continued growth

Takeaways
- Jan - Nov 2025 volumes increased 4.9% y-o-y
- November 2025 volumes grew 7.2% in comparison to November 2024
- Despite general economic uncertainties, volumes continue to grow from last year

Global Container Volumes
in Million TEU

Source: Xeneta, Container Trades Statistics

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November 2025: US imports from Asia at a seismic shift

Takeaways

- Lowest volumes on record for October from China to US, while highest from Southeast Asia to US

- Chinese imports declined 1.5 million TEU (-13.8%) Jan-Nov 2025 y-o-y. Mostly offset by rise of 948k TEU (+18.3%) out of Southeast Asia

China vs Southeast Asia to US Container Volumes
in kTEU

Source: Xeneta, Container Trades Statistics

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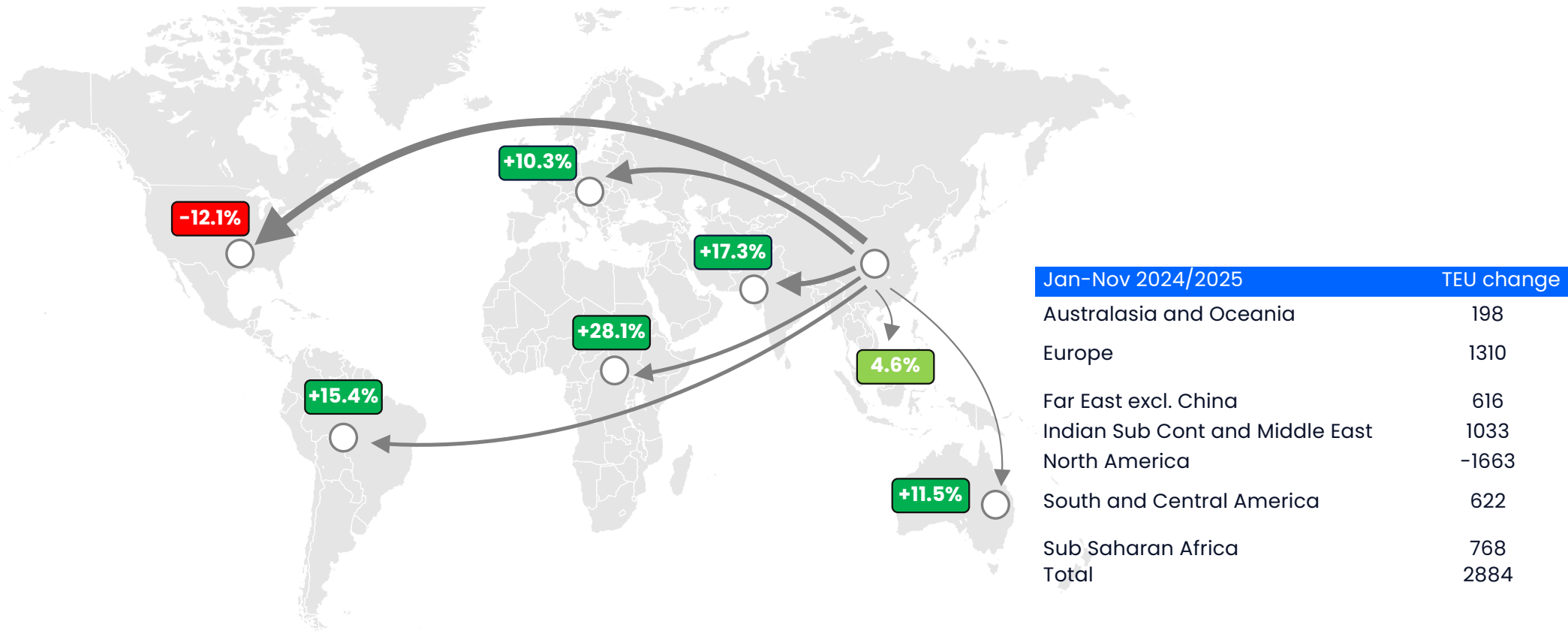# China finding alternatives to the US

Chinese exports up 5.3% y-o-y in first 11 months of 2025 (latest data)

Year on year change in China's containerized exports in Jan-Nov
Percentage change

Jan-Nov 2024/2025	TEU change
Australasia and Oceania	198
Europe	1310
Far East excl. China	616
Indian Sub Cont and Middle East	1033
North America	-1663
South and Central America	622
Sub Saharan Africa	768
Total	2884

Map labels:
- −12.1% (North America)
- +10.3% (Europe)
- +17.3% (Indian Sub Cont and Middle East)
- +28.1% (Sub Saharan Africa)
- +15.4% (South and Central America)
- 4.6% (Far East excl. China)
- +11.5% (Australasia and Oceania)

Source: Xeneta, Container Trades Statistics

Where's the economy heading?

In the East and in the West

→

Growth projection for Global Economy revised upwards again
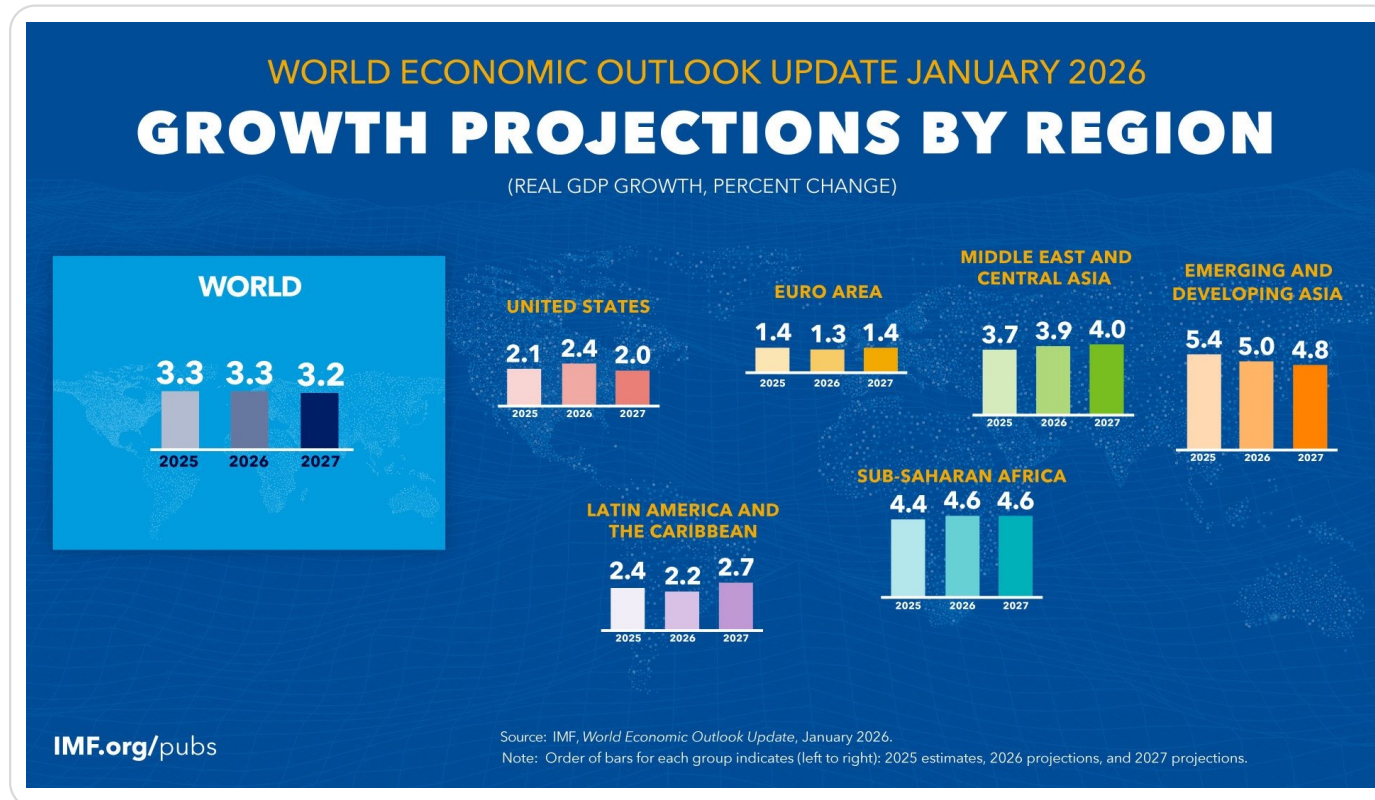
Revisions for 2026 GDP: World +0.1%p; US +0.4%p; +0.1%p; ME&CA +0.4%p; E&DA +0.2%p; LA&TC +0.2%p; SSA +0.5%p

WORLD ECONOMIC OUTLOOK UPDATE JANUARY 2026

GROWTH PROJECTIONS BY REGION

(REAL GDP GROWTH, PERCENT CHANGE)

WORLD
3.3 3.3 3.2
2025 2026 2027

UNITED STATES
2.1 2.4 2.0
2025 2026 2027

EURO AREA
1.4 1.3 1.4
2025 2026 2027

MIDDLE EAST AND CENTRAL ASIA
3.7 3.9 4.0
2025 2026 2027

EMERGING AND DEVELOPING ASIA
5.4 5.0 4.8
2025 2026 2027

LATIN AMERICA AND THE CARIBBEAN
2.4 2.2 2.7
2025 2026 2027

SUB-SAHARAN AFRICA
4.4 4.6 4.6
2025 2026 2027

IMF.org/pubs

Source: IMF, *World Economic Outlook Update*, January 2026.
Note: Order of bars for each group indicates (left to right): 2025 estimates, 2026 projections, and 2027 projections.

- Compared to projections in October 2025: 'World' increases again by 0.1 percentage points for 2026.

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XENETA SUMMIT 25

OCTOBER 9-10 2025, Barcelona

Shippers
Freight Forwarders

Ocean Carriers
Airlines

SAVE THE DATE:
4-5 November 2026
Munich, Germany
Xeneta Summit 2026

Webinar: On Demand

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6 Questions to Ask Your Suppliers Before Signing 2026 Contracts

Pressure-test your suppliers' bids with real-time freight data before you lock in next year's tenders

📅 Tuesday, December 16, 2025 🕐 4:00 PM Central European Time ⧗ 45 minutes

In this session, Xeneta experts reveal:

- How to validate supplier rate levels against real-time market benchmarks on your key US trade lanes

- How to challenge vague supplier justifications with concrete, lane-level insights your finance team can stand behind

- Where you have negotiation leverage for 2026, and where it makes sense to lock in and protect capacity

- How to avoid overpaying on strategic trade routes and reduce regret when spot or contract markets move

Speakers

Antonio Schiano Lomoriello
Lead Value Engineer, Xeneta

Reda Beloui
Enterprise Account Director, Xeneta

Eunice Medina
Director of Customer Success, Americas, Xeneta

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Webinar: On-Demand

In this session, Xeneta experts reveal:

- Enrich your existing Xeneta workflows with operational visibility

- Assess and compare carriers based on actual network performance

- Understand how eeSea's bottom-up methodology differs from traditional top-down views

- Unlock more powerful analyses as Xeneta and eeSea data are combined over time

Speakers

Fabio Brocca
Chief Product Office, Xeneta

Fabio Brocca is the Chief Product Officer at Xeneta, where he leads the company's product strategy and the evolution of its Freight Intelligence platform.

Fabio brings prior leadership experience from Amazon and MSC, where he focused on building technology and...

See more

Simon Sundboell
VP Ocean Liner Networks & Schedules, Xeneta

On a journey to build an industry-wide platform for container shipping.

Before that, 15+ years of broad corporate experience in transportation & logistics. Skilled within operations, sales & marketing, finance in local, regional and global...

See more

[Watch now]

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Thank you!

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