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By Ian Putzger Americas correspondent 22/06/2026

The combination of tight ocean capacity and an early peak season is causing transpacific shippers to consider shifting traffic to air cargo, but space constraints are limiting their options.

This month the US National Retail Federation (NRF) declared, in its monthly Global Port Tracker, that the 2026 peak season for retail imports had arrived early this year, and upped its forecast for boxed imports in June to 2.25m teu, 14.3% higher than June 2025.

“That’s partly driven by retailers bringing in merchandise early, because of higher costs from tariffs or fuel prices, that could start coming in August,” said Jonathan Gold, NRF VP for supply chain and customs policy.

After a 17% jump in May, to 840,165 teu, the port of Los Angeles has projected container throughput this month to exceed 900,000 teu, driven by strong imports, while exports have declined.

“Peak season demand out of Asia Pacific is arriving earlier and with greater intensity this year, particularly as shippers front-load volumes ahead of anticipated cost increases and ongoing disruptions,” reported Niki Frank, CEO of DHL Global Forwarding Asia Pacific. “Demand is up around 4% year-to-date, driven by strong export momentum out of Asia.”

Catherine Chien, chair of Dimerco, added: “A significant portion of the current volume appears to be front-loading. This has tightened vessel utilisation and supported higher ocean freight rates.

“However, it also suggests that demand could soften later in the traditional peak season once inventory replenishment is complete,” she added. This tallies with the NRF’s projections of a relatively short peak season.

“The current import surge will likely last into July, with an early peak season that resembles the more recent pattern of raised volume rather than a sharp peak," said Ben Hackett, founder of Hackett Associates, in the Global Port Tracker. "After this, we expect a weakening in import volume as consumer uncertainty remains high and the impact of increasing inflation takes its toll."

Besides its early arrival and expected duration, this peak season is also different from past patterns in other aspects, Mr Frank added.

"What is notable is not just the level of demand, but its dynamics. We see a more compressed peak, with customers booking earlier and often securing buffer capacity to manage uncertainty. This creates short bursts of tightness rather than a sustained peak, making planning significantly more complex."

Transpacific container capacity has been stretched and box rates have risen, Ms Chien reported, noting that this was partly the result of blanked sailings.

And Mr Frank said: "Capacity constraints remain structural rather than purely cyclical. Nominal fleet capacity is still growing, but effective capacity remains tight as vessels are spending longer in transit due to re-routing, congestion, and slower sailing speeds."

Capacity constraints have been more pronounced in north and east China, Ms Chien noted, adding: "In South Korea, US-bound ocean rates and space pressure have also increased as carriers prioritise China cargo.

"South-east Asia remains relatively manageable overall, although congestion in India and Thailand is affecting schedule reliability and adding pressure to regional supply chain," she said.

The situation has prompted shippers to consider moving US-bound freight by air instead.

“There are clear signs that some shippers are actively exploring air freight solutions as an alternative to congested ocean routes, particularly as ongoing bottlenecks continue to disrupt supply chains,” reported Alan Dong, senior regional air manager at OEC Group.

Mr Frank described such efforts as selective and tactical.

“We are not seeing a broad shift from ocean to air, but rather targeted mode shifts for critical, high-value, or time-sensitive cargo such as semiconductors, electronics, and spare parts.

This reflects a more mature response from shippers not over-rotating into airfreight but using it as part of a multimodal strategy to protect critical supply chains – “a decision driven more by risk management and service continuity than by pure speed”, he commented.

One factor limiting modal shift to air on a larger scale is capacity. Ms Chien pointed out: “Transpacific airfreight capacity remains tight across much of Asia, driven primarily by sustained demand from the semiconductor, AI server, data centre, and broader hi-tech sectors.

“According to Aevean, Taiwan recorded 276% year-over-year air cargo volume growth in the first four months of the year, while Thailand’s AI-related exports rose 223% and Vietnam volumes increased 110%. This demand is continuing to absorb available capacity and keep airfreight rates elevated.”

Capacity out of north and east China was also tight, she added, and lift out of Vietnam had “tightened significantly, with exports from both Hanoi and Ho Chi Minh City to the US facing critical space constraints and elevated rates”.

Mr Dong said: “Sudden flight cancellations, often issued without advance notice due to fuel shortages, have created significant backlogs across

Asia. As a result, available space is being filled rapidly, with capacity selling out quickly, and freight rates rising almost overnight."

Dimerco is helping shippers navigate the capacity constraints through a combination of secured carrier capacity, proactive planning, and flexible routing options. Being a top-25 freight forwarder by volume with major Asia air and ocean carriers, it can maintain pre-booked block space agreements to secure uplift on tight lanes and during peak periods.

It also evaluates alternative routings, cross-border trucking solutions in markets experiencing severe airport congestion, and China-Europe rail for suitable shipments, added Ms Chien.

OEC also strives to offer its clients multiple routing options, but these are limited by the conflict in the Middle East, Mr Dong pointed out.

"Some routings are becoming more viable again, but we believe it is still too early to consider them fully normalised. Given the ongoing geopolitical uncertainty, we continue to recommend a cautious, case-by-case approach when evaluating those routes," Ms Chien said.