

The Xeneta Weekly Ocean Container Shipping Market Update provides data and intelligence including the latest freight rate and capacity movements across global trades with supporting insight from Peter Sand, Xeneta Chief Analyst.

Xeneta analyst insight - Money on the table for shippers switching imports from US East Coast to US West Coast

Peter Sand, Xeneta Chief Analyst:

“Spot rates continue to tick up from Far East to US East Coast and US West Coast, but the most intriguing story is found in the spread between these two fronthaul trades because there is significant money at stake for shippers depending on which seaboard they choose to import into.

“Importing into the US East Coast is currently USD 3 334 per FEU (40ft container) more expensive than the US West Coast. Incredibly, this current spread between the trades is greater than the total cost of shipping one container into either coast before the start of the Middle East crisis on February 28 when spot rates stood at USD 1 879 per FEU into US West Coast and USD 2651 into US East Coast.

“If a shipper has the flexibility of importing goods into US West Coast instead of US East Coast, then they must seriously consider it because there is dramatic savings potential, even if it means a heavier reliance on truck and rail to reach the final destination. This underlines the dynamic approach supply chain professionals must take in managing resilience and freight spend during major market shocks.”

Split between Europe and US fronthauls

“There is also a split to be found at a global level, with Europe bound fronthauls from the Far East softening while the US trades continue to inch up.

“Spot rates to the US East Coast are up almost 300% compared to pre-Middle East crisis, demonstrating the negotiating strength carriers have right now. But the European trades show there is a ceiling, with spot rates into North Europe and Mediterranean softening for over a month.

“Uncertainty is toxic for supply chains and the uncertainty feels more severe in the US, which could explain why rates are still heading upwards. But US shippers should certainly look towards Europe when negotiating because it shows carriers are not invincible and it is possible to negotiate lower rates.”

Data highlights

Market average spot rates – 21 August 2026

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Far East to US West Coast: USD 7,193 per FEU (40ft container)

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Far East to US East Coast: USD 10,527 per FEU

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Far East to North Europe: USD 4,801 per FEU

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Far East to Mediterranean: USD 5,526 per FEU

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North Europe to US East Coast: USD 2,734 per FEU

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Spot rate change from 14 August 2026

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Far East to US West Coast: +2.7% from a week ago

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Far East to US East Coast: +2.8% from a week ago

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Far East to North Europe: −2.8% from a week ago

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Far East to Mediterranean: −3.8% from a week ago

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North Europe to US East Coast: +0.1% from a week ago

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Spot rate changes since the end of February (pre-crisis) – 21 August vs 28 February 2026

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Far East to US West Coast: +283%

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Far East to US East Coast: +297%

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Far East to North Europe: +116%

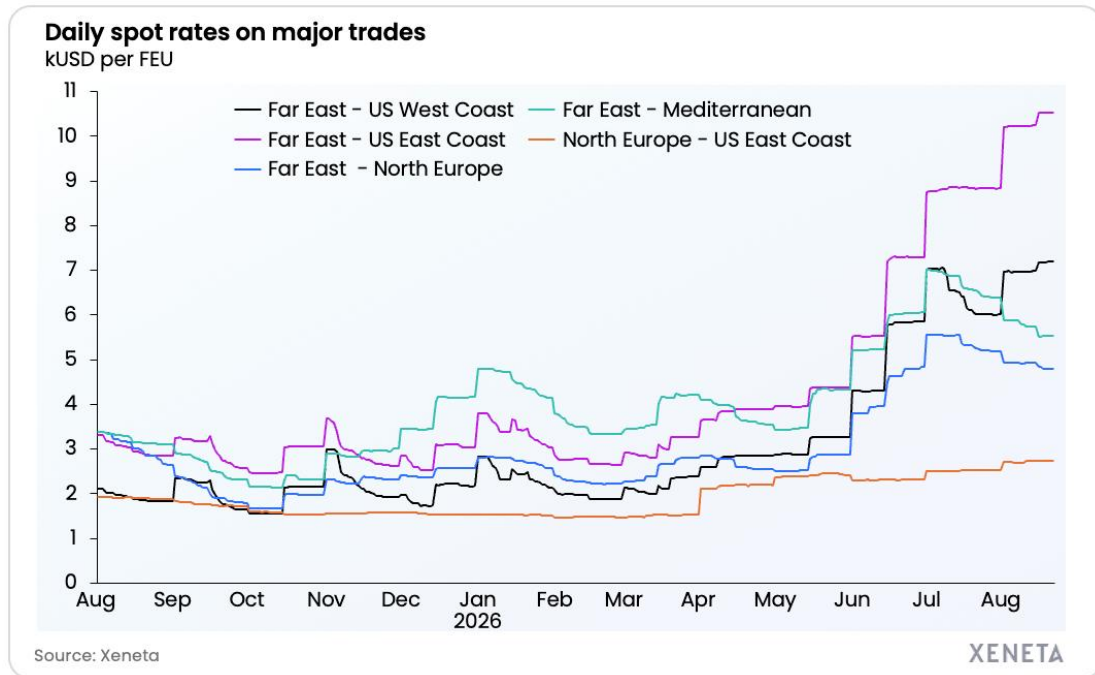
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Far East to Mediterranean: +66%

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North Europe to US East Coast: +85%

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Long term rate changes since the end of February (pre-crisis) – 21 August vs 28 February 2026

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Far East to US West Coast: +39% (USD 2,812 per FEU)

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Far East to US East Coast: +42% (USD 4,399 per FEU)

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Far East to North Europe: +50% (USD 2,879 per FEU)

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Far East to Mediterranean: +19% (USD 2,681 per FEU)

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North Europe to US East Coast: +56% (USD 2,155 per FEU)

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