

Zava Market Brief

Ocean Freight — Transpacific Eastbound → NA-West — Q3 Market Brief

Brief ID: MB-2025Q3-OCEAN-NAWEST • Sentiment: Negative • Updated: 2025-08-25 • Region: Lane: APAC → NA-West (LA/LB) • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

All-in FEU rates remain elevated with GRIs in play. Transits are stable, but reliability still

lags pre-peak norms. For Zava, freight is the largest source of landed-cost volatility this

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
FEU all-in (demo)	\$5,150	+3.5%	+28%	High
Avg transit (port-to-port)	18 days	0	-2d	Medium
GRI/Surcharges	Active	—	—	Medium

Drivers & risks

• Driver: Blank sailings concentrate capacity and support pricing

• Driver: Peak retail pulls keep load factors high

• Risk: Weather or labor disruptions could add 2-4 days to dwell

• Risk: Chassis availability remains uneven in key yards

Implications for Zava

• Cheapest FOB suppliers can lose on total landed cost vs faster lanes

• Tighter delivery windows around product drops increase expedite risk

• Mid-month GRI announcements

• LA/LB import dwell trends and appointment availability

• Favor suppliers with reliable cut-offs over marginal unit-cost wins

• Maintain a small air-bridge option for A-tier SKUs tied to campaigns

Recommended actions

• Budget a +10% surge scenario; split loads across two sailings when possible

• Favor suppliers with reliable cut-offs over marginal unit-cost wins

• Maintain a small air-bridge option for A-tier SKUs tied to campaigns

• Mid-month GRI announcements

• LA/LB import dwell trends and appointment availability

• Favor suppliers with reliable cut-offs over marginal unit-cost wins

• Maintain a small air-bridge option for A-tier SKUs tied to campaigns