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Fragile momentum as air cargo leans too heavily on e-commerce

Over the past few years, cross-border e-commerce from China has fuelled growth in air cargo. Platforms like Temu and Shein have filled global lanes with low-value parcels–fast-moving, lightly regulated, often duty-free. But momentum is slowing. The United States has ended its generous de minimis threshold, removing duty-free entry for low-cost imports from China and Hong Kong. The EU is preparing similar steps, including the planned phase-out of its own de minimis regime. Brussels has now officially announced a 2 euro handling fee on parcels arriving from China–part of broader efforts to rein in direct-to-consumer air freight. In the U.S., volumes have already dropped significantly. Temu and Shein are now shifting their focus to Europe, boosting ad spend in markets like France and the UK–as explored in our In Focus article on their strategic realignment. But similar regulatory limits may soon follow. This is not driven by protectionism–it reflects growing concerns over product safety, market fairness, and the environmental footprint of shipping millions of small parcels by air. Public and political pressure is rising against models that bypass local systems and strain national infrastructure. Airlines and logistics providers would do well to read the signs. E-commerce will remain important, but future resilience lies in broader foundations. Those who diversify into time-critical logistics, temperature-sensitive cargo, or sustainable long-term partnerships will be better positioned for the years ahead. The sector's next chapter won't be written by volume alone–but by flexibility, foresight, and smarter value creation.

Oliver Link,
Editor, DVZ

IN FOCUS

Temu and Shein shift focus to Europe

Facing tighter trade restrictions in the U.S., Chinese e-commerce platforms Temu and Shein are now investing heavily in European markets. According to data from analytics firm Sensor Tower, both companies significantly increased their digital advertising spend in April–especially in France and the UK. Temu raised its ad budget by 40 per cent in France and 20 per cent in the UK, while Shein posted identical growth rates. Compared to April 2023, Shein doubled its advertising spend in France, and Temu increased it by 115 per cent. The strategy appears to be paying off: In the UK, Temu's app downloads doubled in April; Shein saw a 25 per cent increase. In the U.S., both platforms are now facing stricter import rules after the removal of the de minimis exemption. The European shift is likely linked to Temu's newly announced logistics partnership with DHL. The global logistics provider will handle cross-border services, including warehousing, transportation, and delivery for Temu across Europe.

INSIDE FREIGHT MARKETS

14 Schenker staff join DSV leadership

As part of the DB Schenker acquisition, both Schenker and DSV executives were evaluated not only on their track records and capabilities, but also on their professional and personal aspirations. The resulting line-up for DSV's future leadership makes for intriguing reading. Of the 61 names, 14 are from Schenker. It is known that three former Schenker managers will be given top jobs on the executive committee: Helmut Schweighofer as CEO of the road division, Vishal Sharma as CCO and Saskia Blochberger as CPO. It has been known for some time that Schenker CEO Jochen Thewes will join the DSV supervisory board.
The personnel decisions below management board level in the divisions and their regional responsibilities are also exciting. In the Air and Sea division, for example, Daniel Wieland (Projects), a former Schenker man, is the only member of the eleven-strong management team. In Schweighofer's Road division, which is managed by ten people, it is Christoph Matthes (Asia/Pacific region) and Viktor Strömblad (groupage). In the contract logistics business, Rainer Kiefer is the new CCO, Guy Culliford is responsible for global customer management and Catherine Soo for the Asia/Pacific region - so a third of the management team comes from Schenker. Finally, two Schenker employees are responsible for specific sectors: David Resetar for automotive and Shirley Paterson for the technology sector.

Significant front-loading for US imports

Figures from the US customs authority Customs and Border Protection (CBP) quantify for the first time the extent of the pull-forward effects triggered by the US tariffs when importing goods into the USA. In the first quarter of the 2025 fiscal year, goods worth USD 1.89 trillion were imported - more than half of the total import volume in 2024 (USD 3.36 trillion). The figures indicate a significant shift in trade flows. The sharp increase within just a few months can hardly be explained by economic factors alone and is seen as an indication of strategic stockpiling. It appears that many companies have brought forward their imports in order to anticipate impending tariff increases.

Northern European ports reach capacity limits

Several key Northern European ports–including Hamburg, Antwerp, Rotterdam, Wilhelmshaven, and London–are currently operating at or beyond capacity. According to a customer advisory from Kühne + Nagel, waiting times for container ships have surged over the past month. Hamburg topped the list with ships waiting an average of 2.6 days last week, while in some ports delays of up to ten days are reported. Terminal utilisation exceeding 90 per cent is impairing productivity across the region.
Persistent disruptions–including severe weather, alliance reshuffles, public holidays, and a recent strike in Belgium–are exacerbating delays. Antwerp was particularly affected, with ships halted for 36 hours and inland vessels facing clearance waits of over 100 hours.

In Hamburg, the relocation of MSC from Eurogate to HHLA's Burchardkai and ongoing automation projects are key contributors to congestion. While HHLA maintains that operations are stable, Hapag-Lloyd reports structural strains in western ports and is evaluating adjustments to its services. Volumes in Northern Europe are rising sharply, with carriers like Hapag-Lloyd and CMA CGM reporting strong import-export growth.
Freight forwarders, including Brelog, cite the reorganisation of shipping alliances as a central cause of bottlenecks, adding logistical burdens and costs. Some shippers are expediting U.S.-bound exports due to a temporary tariff pause.
Meanwhile, capacity between Asia and Europe has soared to a record 515,000 TEU. Analysts suggest liner network restructuring and redirected goods–originally bound for the U.S.–may explain the spike. Speculation is growing that Chinese exporters are increasingly targeting Europe to offset lost American demand, adding further pressure to already strained European ports.

IMO climate rules to reshape fuel economics

Bunker costs in global shipping could nearly double by the mid-2030s. New climate regulations from the International Maritime Organization (IMO), set to take effect in 2028, will require shipping companies to reduce the greenhouse gas intensity of onboard energy year by year. The key metric is grams of CO_2 equivalent per megajoule (gCO_2eq/MJ), already used under FuelEU Maritime in EU waters. Carriers exceeding targets receive surplus units; those missing them must buy remedial units or pay tiered penalties of up to 480 US dollars per tonne of CO_2eq. Most will weigh penalties against high prices for alternative fuels. UK consultancy MSI estimates total annual costs could reach 95 billion US dollars by 2035, while Germany's Peter Döhle Group–operator of the world's largest tramp-owned fleet of containerships–projects 90 billion US dollars. That would nearly double current fuel expenses. By 2035, CO_2 penalties per tonne of marine fuel may hit 456 US dollars–equal to today's Rotterdam market price. Yet alternatives like biofuels or e-fuels remain scarce and costly. Döhle warns that shipping's biofuel demand would exceed current global production. Despite these challenges, industry groups welcome the IMO roadmap as a needed framework. Thanks to early EU rules, European shipowners may gain a head start in adapting.

This text was edited with the support of artificial intelligence (AI) and checked by the editorial team after editing.

GLS eyes further growth after IDS takeover

Following the IDS takeover by EP Group, GLS CEO Karl Pfaff told DVZ International there are no planned changes to the group's strategic direction and that he expects continued investment to drive profitable growth. In recent years, GLS has recorded double-digit annual growth in its core European markets and plans to reach 40 per cent out-of-home deliveries in the B2C segment within four years. Expansion is ongoing in Eastern Europe, with Greece, Serbia and selected Balkan markets under review. Outside Europe, GLS has built nationwide networks in Canada and parts of the US, covering all postcodes through regional partners. Transatlantic services are being expanded, offering competitive transit times and pricing between Europe and North America. In Asia, GLS is pursuing market access through a strategic partnership with SF Express. China, as the largest parcel market globally, plays a central role in GLS's long-term global strategy, especially in cross-border e-commerce logistics. Further network extensions into Mexico and South America are being considered.

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Export optimism drops, Allianz Trade survey finds

Global trade sentiment has weakened sharply following new US tariff announcements on 2 April. A survey by Allianz Trade of 4,500 exporters in nine major economies shows optimism has halved: 80 per cent expected export growth before the announcement, only 40 per cent after. Allianz forecasts global export losses of 305 billion US dollars in 2025. German exporters remain cautious. While early 2024 saw 82 per cent expecting higher sales, only 40 per cent do now. Amid geopolitical risks and rising energy costs, one in three German firms considers halting production temporarily. 84 per cent have advanced import orders during the 90-day tariff moratorium. Price strategies vary: 30 per cent plan to absorb costs, 17 per cent aim to cut prices. Over 90 per cent of German firms intend to enter new export markets. The decoupling of US and China boosts interest in Latin America and Asia, as firms seek new suppliers and shift logistical responsibilities.

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BEHIND THE SCENES IN BRUSSELS

Transport chambers of commerce criticise border controls

They harmed the competitiveness of the European economy and led to increased costs and unpredictable delivery times for many companies. In a resolution adopted in the run-up to the 40th anniversary of the signing of the Schengen Agreement on 14 June, the UECC therefore calls for "the immediate lifting of all permanent or regularly extended internal border controls within the Schengen area, unless there is an acute and specific threat". The cost of controls is disproportionate to the benefits. Instead of increasing security, the controls weakened the mutual trust that had been built up between the regions over decades. "A Europe with barriers at every border is a step backwards," explained UECC President Davor Sertic. "We must preserve the trust and freedom of movement that underpin our economy and our cohesion."

Poland pushes EU compromise on heavier trucks

Ahead of the 5 June Transport Council, the Polish EU Presidency is seeking movement on the directive for vehicle weights and dimensions. A Polish compromise aims to ease opposition to cross-border use of longer and heavier trucks, DVZ International has learned. One option would limit the road network these vehicles can use to protect infrastructure. This has slightly increased openness among sceptical member states, a diplomat said. However, three major country groupings remain opposed for different reasons. Following further expert talks, EU ambassadors are to decide on 28 May whether and how to forward the file to ministers. While the European Parliament set its position in March 2024, member states have yet to agree a joint line. Only then can final negotiations begin.

BEHIND THE SCENES IN BERLIN

German Transport Ministry reshuffles: Hirte takes over freight and logistics

Germany's Federal Ministry for Digital and Transport (BMV) has reassigned key responsibilities. Parliamentary State Secretary Christian Hirte (CDU) will now oversee strategic policy as well as freight transport and logistics, according to internal documents seen by DVZ International. He will also handle inland waterways, shipping, road transport and federal highways. Fellow State Secretary Ulrich Lange (CSU) is responsible for aviation, rail and the ministry's budget. Among senior civil servants, Stefan Schnorr covers rail, including DB InfraGO oversight, as well as aviation, roads and finance. Claudia Stutz is in charge of central services, policy coordination, federal highways and maritime transport. No assignment has yet been announced for the ministry's communications unit.

COMPANY NEWS

Financial stability key priority for new Otto CEO

At the annual results presentation for 2024/25, Otto Group CEO Petra Scharner-Wolff reported a strong recovery in earnings. EBIT rose sharply from 8 million to 276 million euros, while the group returned to a post-tax profit of 165 million euros after a 412 million euro loss the previous year. Revenue declined slightly to 14.9 billion euros, down from 15 billion euros, but adjusted figures showed modest growth. Scharner-Wolff, who took over as CEO in March 2025, said the group is focused on financial stability, aiming to maintain turnover and increase profitability. The number of employees fell to 36,304, reflecting a continued restrictive hiring policy. While geopolitical risks persist, the company expects no major supply chain disruptions. The key challenge remains weak consumer sentiment in Germany. Otto's e-commerce platform delivered solid results, with revenues up 5.6 per cent to 4.4 billion euros and the customer base rising four per cent to 12.2 million. Third-party sellers continue to drive growth.

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German firms unprepared for EU Data Act, Bitkom warns

Fewer than five per cent of German companies have addressed the EU Data Act, which comes into force on 12 September 2025. A Bitkom Research survey of 605 firms found that only one per cent have fully implemented the rules, and four per cent have partially done so. More than half believe they are not affected. Bitkom President Ralf Wintergerst warned of repeating GDPR mistakes, urging management and policymakers to act. The law aims to ease cloud switching and give users and third parties rights to data from connected devices. Two-thirds of affected firms report high implementation costs, and 75 per cent say this limits resources for innovation. Still, many plan to expand data-driven models: firms expecting strong revenue impact from data are set to rise from 27 to 47 per cent within two years. Currently, 41 per cent use data marketplaces; 59 per cent plan to offer data. Only six per cent see Germany as a leader in data economy—far behind the US and China.

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AIR

US air freight imports from China lose momentum

The recent capacity surge on transpacific routes following the U.S.-China tariff deal proved short-lived. According to consultancy Rotate, air cargo capacity rose just 3 per cent week-on-week after an initial 30 per cent spike post-tariff cut on 14 May. The increase had briefly added up to 1,000 tonnes per day. The temporary boom followed a presidential decree lowering U.S. tariffs on Chinese imports from 145 per cent to 30 per cent for 90 days. China reciprocated by reducing its tariffs from 125 per cent to 10 per cent. Despite the changes, capacity remains 19 per cent below April's average. E-commerce shipment values rose 30 per cent versus April 2024, per Trade and Transport Group. USPS shipments under 800 US-Dollars now face a 54 per cent duty or a 100 US-Dollars flat rate—down from 120 per cent, but still well above pre-2024 levels. Private carriers like UPS, FedEx and DHL are subject to a flat 30 per cent rate.

SEA

Chinese container bookings hit daily records as US tariffs ease

Container bookings on the transpacific trade are reaching new daily highs as a result of the provisional tariff reductions on US imports of goods from China. According to data from the US-based tracking service provider Vizion, new year-to-date highs were recorded on each of the first three days of the past week: on Monday, 12 May, booking volume stood at 39,693 TEU, on Tuesday at 43,157 TEU - the highest daily figure so far in 2025 - and on Wednesday at 42,296 TEU. Previous peaks had been recorded on 6 January (34,721 TEU) and 24 March (31,326 TEU).

ROAD

Insurance fuels growth at Waberer's

Waberer's increased its profitability significantly in Q1 2025, despite a slight drop in revenue. Group turnover fell by 1.2 per cent to 194.4 million euro, but EBIT rose by 29.3 per cent to 11 million euro, and net profit surged by nearly 585 per cent to 7.5 million euro. The logistics segment saw a 10.3 per cent revenue drop to 155.9 million euro, burdened by fleet reductions, shifting customer portfolios, and weak European demand. Segment EBIT fell nearly 46 per cent to 1.4 million euro. In contrast, the insurance division, bolstered by the acquisition of the Posta insurers, posted a sales jump of 87.1 per cent to 38.6 million euro and EBIT growth of 62 per cent to 9.6 million euro—making it the group's most profitable area. CEO Zsolt Barna considers a stock market spin-off of the insurance arm. Waberer's aims for EBIT over 50 million euro in 2025 and 100 million euro by 2031.

Climate economist urges hauliers to fix fuel prices

With the EU ETS 2 coming into effect in 2027, logistics firms should secure fixed-price fuel contracts that include CO_2 costs, says Professor Matthias Kalkuhl from the Potsdam Institute for Climate Impact Research. Under the new emissions trading system, diesel distributors will need one certificate per 370 litres sold, with prices determined by daily trading on European exchanges. Kalkuhl warns that most transport companies are not allowed to trade emissions futures directly. Without forward contracts, they face exposure to volatile certificate prices. “Binding fuel agreements with CO_2 pricing components help ensure cost predictability, though they may exceed market lows,” Kalkuhl told DVZ International. He also recommends gradually shifting to electric vehicles and managing diesel usage more efficiently. ETS 2 futures have already started trading in Amsterdam and London, with the first closing price at 73 euros per tonne.

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LOGISTICS

ID Logistics aims to double turnover

Contract logistics specialist ID Logistics plans to double its global turnover once again - continuing a pattern the company has maintained roughly every five years. In 2023 alone, ID Logistics grew its revenue by nearly 20 per cent. Germany is an important market in the company's expansion strategy. In an interview with DVZ International, Robin Otto, head of the company's German operations, said: “We want to break into the top five contract logistics providers in the German market.” To achieve that goal, ID Logistics aims to increase its German turnover from around 300 million euros today to between 500 and 750 million euros.

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Bertschi: Germany losing ground in freight logistics

The ports of Antwerp and Rotterdam are gaining significance for inland transport, says Hans-Jörg Bertschi, Chairman of Swiss chemical logistics firm Bertschi AG. “For modern land transport, Benelux is now at least as important as Germany,” he told DVZ International. He attributes the shift to deindustrialisation in Germany and high energy costs, leading to more imports routed via Antwerp and Rotterdam rather than German ports. Bertschi recently opened a 2,500 TEU terminal in Antwerp, which reached full capacity within three weeks. “The port is flooded with cargo,” he said, noting that the volume was not driven by demand, but by containers redirected ahead of US tariffs imposed by President Trump on 2 April.

FORWARDING

Geis Increases stake in Quehenberger

The Franconian logistics company Geis is acquiring an additional 20 per cent stake in the Austrian Quehenberger Group, retroactive to January 1, 2025 - subject to antitrust approval. The seller is the CF Foundation, which is backed by Christian Fürstaller. With this transaction, Geis will hold 86 per cent of Quehenberger's shares, thereby gaining sole control of the company. The remaining 14 per cent, still held by the Fürstaller Foundation, are expected to transfer to Geis on January 1, 2027. Christian Fürstaller will remain CEO of Quehenberger and continue to serve on the Executive Board of Geis. Geis originally acquired a 66 per cent majority stake in Quehenberger in 2023.

ON THE MOVE

Lufthansa Cargo reorganises the executive board

Lufthansa Cargo is reorganising the responsibilities on its executive board as of 1 July 2025. Frank Bauer, currently Chief Financial Officer and Labour Director, will be appointed Chief Operating Officer (COO) and will assume responsibility for the cargo airline's operational business. Gregor Schleussner, currently Head of Finance, Controlling & Accounting at Eurowings, will take over Bauer's former responsibilities for Finance and Human Resources. He will become the new Chief Financial Officer (CFO), Chief Human Resources Officer (CHRO) and Labour Director of Lufthansa Cargo. In future, Schleussner will be responsible for Finance, Human Resources, Legal Affairs, IT, Infrastructure and Procurement. Both executives have been with the Lufthansa Group for many years. Frank Bauer began his career at Lufthansa Cargo in 2007 and has since held management positions at Jade Cargo in China, at Eurowings, and in Group Controlling at the Lufthansa Group, among others. He has been responsible for Finance and Human Resources at Lufthansa Cargo since August 2023. Gregor Schleussner joined the Group in 2006 and has held various positions in Product Management, Investor Relations, Group Controlling and in the Office of the CEO of the Lufthansa Group. He has been Head of Finance at Eurowings since 2021.

ON THE RECORD

Commerce is like water in a stream – when it finds a rock, it goes around

Fred Smith, founder and executive chairman of FedEx

IMPRINT

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