REGIONAL PULSE

A Member-Driven View of the Global Moving Industry

Prepared by the **IAM Core Members Management Board**

A Message from Your CMMB

This Regional Pulse Survey establishes a new model for surfacing operational intelligence across IAM's global membership. The Core Members Management Board (CMMB) was created to serve as a bridge between IAM leadership, staff, and the members who do this work every day. This report is the outcome of that effort.

Between February and April 2026, each CMMB regional representative developed a survey tailored to the priorities and pressures impacting their respective markets. **Africa, Central, South America & the Caribbean, Eastern & Southeastern Asia, Europe, the Middle East & Near Asia, North America, and Oceania** each asked the questions that mattered most locally. The CMMB and IAM staff then reviewed the findings collectively to identify both regional distinctions and emerging global patterns. The report you are reading is the product of that conversation. What follows is the IAM membership speaking through their regional representatives.

On behalf of the CMMB,

Catherina Stier CMMB Chair
and the Regional Representatives

Regional Representatives

Charnel Francis
Africa (Region 1)

Cosmas Kamuyu
Africa (Region 1)

Carlos Avalos
Central, South America & The Caribbean (Region 2)

Daniel Rodrigues
Central, South America & The Caribbean (Region 2)

Olivia Alarcon
Eastern & Southeastern Asia (Region 3)

Nirav Thakker
Eastern & Southeastern Asia (Region 3)

Barbara Savelli
Europe (Region 4)

Christiaan Van der Ent
Europe (Region 4)

Shankar Ram Ganapathy
Middle East & Near Asia (Region 5)

Ankit Bhalla
Middle East & Near Asia (Region 5)

Leon Johnson
North America (Region 6)

Tracie Cohee
North America (Region 6)

Michael Dunstan
Oceania (Region 7)

Carlos Ferri
Oceania (Region 7)

Core Member Representatives Serving on the IAM Executive Committee

Catherina Stier
Chair | Core Members Representative At Large

Boris Populoh
Core Members Representative

Ido Barner
Non-U.S. Core Members' Representative

Ben Scheiner
Non-U.S. Core Members' Representative

Executive Summary

In Q1 2026, more than **230** IAM moving company members across seven regions shared the operational pressures, market disruptions, and emerging risks impacting their businesses.

The findings point to an industry under increasing strain from rising costs, constrained shipping capacity, and new competitive pressures that many members were not facing even two years ago.

At the same time, companies are adapting in real time, testing new revenue streams, evolving operating models, and responding to changing client expectations. Both realities exist simultaneously. This report examines them together.

What This Report Reveals

Across regions, five operational pressures surfaced repeatedly as defining concerns for movers in 2026:

67%	0%	83%	55%	60-80%
Cited delayed or non-payment risk as a top financial concern *(North America)*	**Reporting being able to fully recover rising operating costs** (Middle East & Near Asia)	**Reported increased customer price sensitivity** *(Eastern & Southeastern Asia)*	**Identified labor availability as the top operational challenge** *(Europe)*	**Full price spikes following geopolitical disruption** *(Africa)*

A note on the methodology.

This report draws on two sources of equal weight. The first is voluntary survey responses from more than 230 IAM moving company members across seven regions, an 11% response rate from a global membership of approximately 2,100 companies. The second is regional debrief discussions with the CMMB regional representatives, conducted by conference call with IAM staff in the room.

Together, they form the methodology: quantitative input from the membership, qualitative interpretation by the regional representatives. Suppliers were not surveyed; this report is intended to surface the operational voice of movers. The sample reflects active, engaged members operating across all major regional markets.

Africa

CMMB Representatives:
Charnel Francis (AGS Worldwide Movers) & Cosmas Kamuyu (Nellions Moving And Relocations)

60-80%	44%
Recent Fuel Price Spike Following Regional Disruption	Currency Volatility & Margin Compression

What Members Said

Members in Africa pointed to currency volatility and margin compression from fuel and operating costs as the two leading pressures, each cited by **44%** of respondents. Geopolitical and cross-border friction was the next concern at **31%.** Half the region identified constant changes in customs requirements as the single biggest regulatory strain, followed by inconsistent interpretation of personal effects versus commercial goods.

Notably, **50%** of African respondents said workforce gaps were not currently a primary risk, a striking contrast to almost every other region, where talent is the top issue. Africa's request to IAM leadership was clear: continent-specific regulatory intelligence and stronger peer forums.

What's Changed Since the Survey Closed

> *"Since sending out that survey, the world has changed. Nigeria's fuel prices went up by **80%** in a two-week period. Zimbabwe saw **60%.** Kenya is being faced with the same thing. Fuel is now a major, major problem for us at the moment, as a continent, along with container shortages, with the straits being closed and the Suez Canal problem still ongoing. We're battling to get into Central Africa, especially. A massive ripple effect."*
>
> **- Charnel Francis, Africa CMMB Representative**

Charnel and **Cosmas** raised a separate frustration during the debrief: corporate accounts are asking African operators to prove pre-conflict versus post-conflict fuel pricing to justify pass-through charges. Members feel the disconnect between what they are experiencing on the ground and what some clients are willing to accept.

Africa's Ask of IAM:

- Africa-specific regulatory intelligence updates **(44%)**
- Customs and compliance regional guidance **(38%)**
- Regional peer forums or working groups **(38%)**

Central, South America & The Caribbean

CMMB Representatives:
Carlos Avalos (Sandhill Ecuador SAS) & Daniel Rodrigues (AIM Brazil)

52%	62%
Top Concern: Cost Volatility	Top Risk: Geopolitical & Economic Instability

What Members Said

South America's responses reflected a market operating defensively rather than investing for growth. **Carlos** and **Daniel** pointed out during the debrief that no member in the region flagged capacity constraints or systems-and-digital issues as a top concern. That puts South America in what Carlos described as a survival posture, focused not on growth investments but on managing day-to-day cost volatility.

The pressure points are specifically structural: opaque destination terminal handling charges (DTHC), demurrage from slow customs clearance, currency volatility, and political instability that resets the regulatory environment with each election cycle. Half of the respondents flagged customs clearance complexity as a leading regulatory concern.

The Trust Question

A recurring theme in South American responses was the growing lack of trust, both among agents and between agents and their corporate clients. Many respondents highlighted concerns around hidden costs, opaque pricing, and competitors entering the market without the necessary infrastructure or expertise. Several echoed a single sentiment: in today's environment, working with trusted partners and long-term relationships has become essential to doing business successfully.

> *"In South America, we don't have efficient services. You pay a lot, and things don't happen as they normally would. People from South America, Carlos and I and our friends from Argentina, from Uruguay, from Chile suffer at conventions when people say, 'We don't like to work with South America because of this and this.' The problem is real. And when the political situation changes, everything changes. New people in front of the customs officers. New rates. Maybe less if the president changes. Maybe more."*
>
> **- Daniel Rodrigues, Central, South America & The Caribbean CMMB Representative**

The Emerging Security Issue

Carlos also flagged something that surprised all representatives on the call: a deteriorating security environment for road transport in Ecuador. Companies that once moved containers overnight from Guayaquil to Quito are now traveling only during daylight hours, often in convoys, and increasingly hiring private security. These costs must ultimately be passed on without any clarity as to whether this operational change is permanent.

Member Voices from South America

> *"It's amazing how many agents belong to recognized associations, but their service and quality is less than standard. The specifics required by customs matter, agents should adhere to industry standards."*
>
> **- Survey respondent, Argentina**

> *"Brazil is one of the world's largest economies, and it concerns me that many agents choose not to quote removals when the destination is Brazil because they believe the clearance process is very complicated. If the client has the correct documentation, clearance at some Brazilian ports takes three to five days, which is quite reasonable by Latin American standards."*
>
> **- Survey respondent, Brazil**

Eastern & Southeastern Asia

CMMB Representatives:
Olivia Alarcon (A1 Global Logistics Services Co.) & Nirav Thakker (21st Century Relocations)

83%	75%
Increased Price Sensitivity	Peak Season Disrupted

What Members Said

The Asian region's response focused on long-term changes in global mobility rather than short-term market conditions. **Nirav** and **Olivia** argued that what looks like a cyclical slowdown is actually a structural shift in how mobility itself works.

The Shipment is Shrinking

The data backs them up: **80%** of respondents reported declining shipment volumes, but the cause is not just price. Clients are reducing what they ship.

Furnished housing, serviced apartments, and a generational shift toward minimalism mean that more relocations are happening with smaller, sometimes courier-sized shipments. Increased ocean and air freight costs (cited by 89% of respondents) are now treated as a structural floor rather than a temporary spike.

Where the Opportunity Sits

Half of respondents from this region still expect moderate growth in the next **12 months**, but they were clear that growth will not come from shipment volume. It will come from new revenue lines:

- **Downsizing consulting:** helping clients decide what to move when the answer is increasingly "less"
- **Asset liquidation:** monetizing the items clients choose not to take with them
- **Flexible short-term storage:** demand is increasing, as the traditional long-term storage model shifts toward shorter and more flexible assignment timelines
- **Tiered relocation packages:** budget, premium, and hybrid options that let clients self-select
- **Asset-light, network-heavy operating models:** labor and storage pools managed through strategic alliances

> *"It's not a cyclical slowdown. It's a reinvention of global mobility. The shift is from full relocation to essential goods only, and that's not just a price conversation. People are simply choosing to move less stuff. Millennials and Gen Z believe in minimalism. They don't have the attachment to things that previous generations did."*
>
> **- Nirav Thakker, Eastern & Southeast Asia CMMB Representative**

The Philippine Cost Equation

Olivia Alarcon, A1 Global Logistics Services Co.

The regional picture has country-level specifics underneath it. The **Philippines** is one of the clearest examples. The strong US dollar and rising inflation are significantly affecting operations in the Philippines. Fuel, vehicle parts, shipping costs, and imported materials are priced in US dollars. As the peso weakens, operating expenses become more expensive, forcing companies to either raise service rates or absorb thinner margins. At the same time, inflation is making consumers and businesses more cautious with spending, softening demand for relocation services.

Where the Pressure is Showing up Operationally:

- **Port congestion.** Containers are sitting for a week before they are discharged.
- **Container returns and trucker fees.** Shipping lines are out of place for warehouse returns, and truckers are charging premium rates based on how many days they wait.
- **Fuel is the dominant cost variable.** With the Middle East situation driving up fuel prices, there is no cheaper alternative by sea, land, or air. Fuel is the single biggest factor in every operational decision.

The result is pressure on three fronts at once: rising input costs in dollars, weakening currency, and softening demand. Philippine operators are managing all three simultaneously.

Europe

CMMB Representatives:
Christiaan van der Ent (Van der Ent Group) & Barbara Savelli (Gosselin)

55%	58%	53%
Labor Availability is the Top Operational Concern	Facing Downward Pricing Pressure	Reporting Increased Late Payments

What Members Said

Europe had the highest response rate of any region, reflecting the fact that a large share of IAM's membership is European. The picture shows a market doing two things at once. The domestic business is the steady backbone (**52%** expect it to remain stable), while international operations carry both opportunity and risk (**46%** see growth, but **28%** see decline).

The single most striking finding: labor availability was cited by 55% of European respondents as the top operational pressure, ahead of fuel and transport costs. This is not primarily a wage issue. Europe is facing a wave of retirements alongside declining interest from younger generations in operational moving roles. Drivers, packers, and warehouse staff are becoming increasingly difficult to recruit across nearly every market represented.

Low-Cost Competition is Reshaping Buyer Trust

A second theme that drew strong agreement during the CMMB debrief call came from the open-text responses: newer entrants are quoting prices that look cheap on paper but exclude essential costs that surface later. Recognized, compliant moving companies are losing jobs to operators who appear to undercut them, and clients are not always able to tell the difference.

> *"We see newcomers coming in with lower prices, of course, with cheaper options, but also making quotes that are not transparent anymore. They exclude costs that will likely be passed on to the customer later. So it looks like they are cheaper. The client chooses the cheaper option, but they are eventually hit with extra costs after signing up. We have to follow strict lines on how we present quotes."*
>
> **- Christiaan van der Ent, Europe CMMB Representative**

"One aspect of the survey that stood out is the widespread concern about companies operating in the sector without meeting the legal requirements of their respective countries. Across Europe, in countries such as Spain, Italy, and Germany, there is a strong and recurring issue regarding the formal recognition of the moving profession within the broader freight transport category. Achieving this recognition would allow for the introduction of specific, tailored regulations aimed at protecting our work and professional standards."

- Barbara Savelli, Europe CMMB Representative

Credit Pressure is Becoming Operational Pressure

54% of European respondents reported either increased or slightly increased late payments. Members cited **60–90**-day payment terms becoming the new normal, with partners stretching credit terms. Several wrote about the need for more thorough credit checks and for tightening their internal processes to manage cash-flow risks.

Member Voices from Europe

"Excess capacity of suppliers and lower inquiry volumes, creating downward pricing pressure and longer payment terms, a double hit."

- Survey respondent, UK

"The biggest challenge in Germany is the continuously rising costs in all areas, from energy, tolls, taxes, and packaging materials. Private household moves are declining drastically because people cannot afford professional moving services. They organize their moves themselves."

- Survey respondent, Germany

Middle East & Near Asia

CMMB Representatives:
Ankit Bhalla (Leader Relocation LLC) & Shankar Ram Ganapathy (Delight International Movers)

78%	0%
Cite Operating Costs as Top Financial Risk	Can Fully Pass Costs Through

Context for This Region

The Middle East survey was distributed before the regional conflict broke out. By the time responses closed, the operating environment had changed so dramatically that the data itself was no longer the most important input. **Ankit** and **Shanka**r did what the CMMB was designed to do: they moved beyond the survey, speaking directly with members across the region to assemble a real-time operational picture for IAM. This section reflects both sources.

> *"At the start of the year, we were all very confident. Then unforeseen circumstances. I need to say that the COVID situation for the industry was, in some ways, better than what we're going through now. The entire shipping industry was almost **100%** disrupted for **20 to 25** days. That is a very long time for the Middle East. We're finding solutions and moving things around, but the whole survey we did is essentially null and void."*
>
> **- Shankar Ram Ganapathy, Middle East & Near Asia CMMB Representative**

Ankit added that with sea shipping no longer a viable option for many lanes, customer goods have been flooding into storage facilities across the region. Most moving companies were never designed for this volume of stored cargo, creating cash-flow pressure for operators and a sudden shift in revenue mix toward storage and away from international shipping.

The Trade Lane is Being Rebuilt in Real Time

MSC Mediterranean Shipping has launched a new service from Antwerp through the Suez into Jeddah and King Abdullah ports, where trucks complete the 800-mile drive across Saudi Arabia to Dammam. From Dammam, feeder vessels reconnect cargo to Abu Dhabi, Dubai, Bahrain, Iraq, and Kuwait. Hapag-Lloyd and Maersk have announced parallel land bridge solutions.

This matters because the Middle East Europe is the primary trade lane for **55%** of regional respondents. The land bridge is rebuilding the exact route the disruption broke. For many movers across the UAE, Qatar, Bahrain, and Kuwait, it also represents an entirely new operating posture requiring cross-border coordination, bonded transport, and regional partnerships that many operators have not previously managed.

Costs Are Rising Faster Than Recovery

The pressure is not only operational; it is a question of who absorbs the cost. 78% of respondents named general operating cost increases as their top financial risk, only 55% can partially pass those costs through, and no respondent can pass them through fully. Costs are rising, recovery is incomplete, and the gap is being absorbed inside the business.

Mover Are Becoming Warehouses

With sea shipping effectively closed, customer goods flooded into storage facilities across the region. Most moving companies in the Middle East were never built for this volume of stored cargo. The result is an unplanned change in the revenue mix, away from international shipping, toward storage, and corresponding pressure on cash flow.

Adaptation is Outpacing Uncertainty

The survey responses themselves carried a steadiness that surprised the CMMB on the debrief call. 44% described their 2026 outlook as positive, and another 44% uncertain. Awareness of IAMTrusted was nearly universal at 89%, and one-third of respondents had already committed to the San Diego Annual Meeting. The region is adapting in real time.

What the Region is Asking For

- Direct connection between Middle East CMMB representatives and IAM
- Regional voice in CMMB-led updates, alongside the daily operational flyers from DASA and Move One
- Real-time intelligence channels through the ePortal

Why This Matters Globally

The Middle East disruption is not regionally contained. Africa is feeling the impact through fuel increases and Suez-related disruption. Asia identified the conflict as a major driver of rising ocean freight costs. Oceania described it as the region's single greatest forward concern.

The pressures surfacing across nearly every region in this report trace back, directly or indirectly, to developments in the Middle East. Understanding what is happening here is, in practical terms, understanding the global outlook for the moving industry.

North America

CMMB Representatives:
Leon Johnson (Matco Moving Solutions), and Tracie Cohee (Von Paris International), with support from Boris Populoh (Unirisc, Inc.), IAM Executive Committee member.

67%	63%
Cite Delayed/Non-Payment as Top Risk	Seeing International Cross-Border as Top Growth

North America's data points to a region squeezed from two directions at once: competitive pressure rising from inside the industry, and financial risk rising from inside the customer relationship. The work is there, but winning it is harder than it used to be.

What Members Said

The pressure points cluster around money and people. Demand volatility and margin compression tied as the top operating pressures, each cited by **54%** of respondents. Competitive pricing pressure from national and digital-first movers and workforce challenges followed at **38%** each. Inside the workforce question, recruiting qualified drivers, packers, and crews was the single largest concern flagged by **60%** of respondents, ahead of every other people-related issue, including wage inflation and retention.

Where Growth Is Expected

International and cross-border moves led the growth outlook at **63%**, followed by corporate or employer-sponsored relocations and high-value, white-glove moves (each at 44%). Open-text responses pointed to a quieter trend running underneath the headline numbers: members are diversifying out of household goods entirely, into humanitarian shipments, cargo, workplace logistics, and other non-HHG lines. Members are starting to ask whether moving stays the core business at all.

The Cash-Flow Story

The most concentrated risk in the entire North American survey was financial. Two-thirds of respondents (**67%**) cited delayed or non-payment by customers and corporate clients as their top cash flow risk, the single highest concentration on any question. Cyber and data risks are tied with claims frequency and severity at **35%** for the next tier.

Underneath the payment delay number is a related and worrying trend: customers using claims as leverage. Several respondents described receiving claims they could not verify, then facing escalation when they pushed back. One respondent named it directly:

" Customer expectations are changing. Since COVID, customers have been falsifying claims and then escalating them without proof or any way for us to verify. We have had four come across our desk in the past five months alone."

- Survey respondent, North America

The Regional Read

"North America reported strong pricing pressure from national and digital-first movers, a trend that may not have been as prevalent in other regions. While Europe is facing a generational aging crisis, our focus is more immediate: recruitment, seasonal and peak capacity, and wage pressure. The positives were international cross-border, high-value white-glove, and military and government business. There's clear interest in diversifying into the workplace and logistics, too."

- Leon Johnson, North America CMMB Represntative

Oceania

CMMB Representatives:
Michael Dunstan (Palmers Relocation Group) & Carlos Ferri (Shipeezi Pty Ltd.)

65%

Significant or Sever Cost Impact

53%

Significant or Sever Competitive Pressure

What Members Said

Oceania's data tells a clear story: cost compression and competitive pressure are the dominant headwinds. Nearly two-thirds of respondents rated margin and operating cost pressure as significant or severe, and a similar share said the same about competitive market fragmentation. Sustainability and environmental compliance scored lower than expected because the region has hit a ceiling on what it can absorb.

The Compliance Cost Question

"I think the region is reaching its limit on the go-green sustainability conversation, just because of the cost. Everyone feels that pinch down this part of the world. We've got some of the strictest government and quarantine regulations in the world, and the cost of being compliant and passing that on to the client has just become unreasonable."

- Michael Dunstan, Oceania CMMB Representative

The Compliance Cost Question

The intel **Carlos Ferri** shared fills in the picture behind the numbers. Three regional dynamics are putting them there:

- **A K-shaped New Zealand recovery**. Auckland sits flat under high townhouse supply, while Christchurch opened 2026 with median prices up roughly 2.6%. Members are pricing two different markets inside one country.
- **The trans-Tasman brain drain**. Roughly 30,000 New Zealand citizens are leaving for Australia annually, a record outflow driving a surge in trans-Tasman moving demand even as international arrivals from Asia bottom out. The volume is not disappearing; it is shifting.
- **A January–February rental crunch in gateway cities**. Australia's 2026 student visa planning level hit 295,000, and Melbourne and Auckland are absorbing the impact. Corporate landing dates are slipping, lead times are stretching, and members are eating the delay.

A Wider Concern

One Oceania respondent put the geopolitical exposure plainly: *"The Middle East crisis is currently our greatest concern if it escalates, as that will have a severe impact on the business in the months ahead."* The conflict is not regionally contained in members' minds. It is impacting the outlook everywhere.

Five Themes That Cut Across Every Region

When the seven regional reports are placed side by side, five patterns emerge clearly. None of these were apparent from any single survey on its own. They are visible only because the CMMB convened the conversation across regions.

1. Cost Pressure Is Universal. The Source Is Regional.

Across parts of Africa, fuel prices surged 60–80% within weeks. South America points to opaque port charges and demurrage. Europe and North America cite labor and wage inflation. Asia is hit hardest by ocean freight. Every region is paying more. None are paying more for the same reason.

2. The Middle East Conflict Has Redrawn The Global Map.

Sea shipping through the region was effectively halted for nearly seven weeks at the time of reporting. Containers were stranded across continents. The ripple effect was felt simultaneously in Asia, Africa, and Europe. Carriers are now rebuilding the route through Saudi Arabian land bridges. The cost base of an entire trade lane has been reordered.

3. Volumes Are Down. Shipments Are Smaller. Clients Are Price-sensitive.

More than 80% of respondents in Asia reported increased client price sensitivity. Europe sees inquiry volumes falling. North America points to demand volatility as a top three concern alongside margin compression. This is not a short-term slowdown. It reflects a longer-term change in customer behavior.

4. Trust Between Agents Is Being Tested.

South America and Europe both flagged a rise in opaque quoting from newer market entrants. Payment delays surfaced across nearly every region. North America identified delayed or non-payment as its single greatest cash-flow risk at 67%. Trust is now a market condition.

5. Relationships Remain The Industry Stabilizer.

Across every regional conversation, representatives returned to the same conclusion: relationships built in person carry companies through disruption. Conferences are not optional. In a fragmented market, relationships remain operational infrastructure.

What Comes Next

The next **Regional Pulse Survey** launches following peak season, when movers are better positioned to assess evolving market conditions. The CMMB will reconvene to design the questions, drawing directly on what this report surfaced.

To the members who took time to respond: thank you. The institutional voice this report carries is yours. The feedback you raised and the realities you described will influence what the CMMB does next.

Questions, comments, or intelligence you would like the CMMB to carry into the next cycle?
Reach out to your regional representative, or to the IAM staff liaisons who support the CMMB:
Julia O'Connor (juliao@iamovers.org) and **Matthieu Odijk** (matthieu.odijk@iamovers.org).