TRANSPORT STATUS

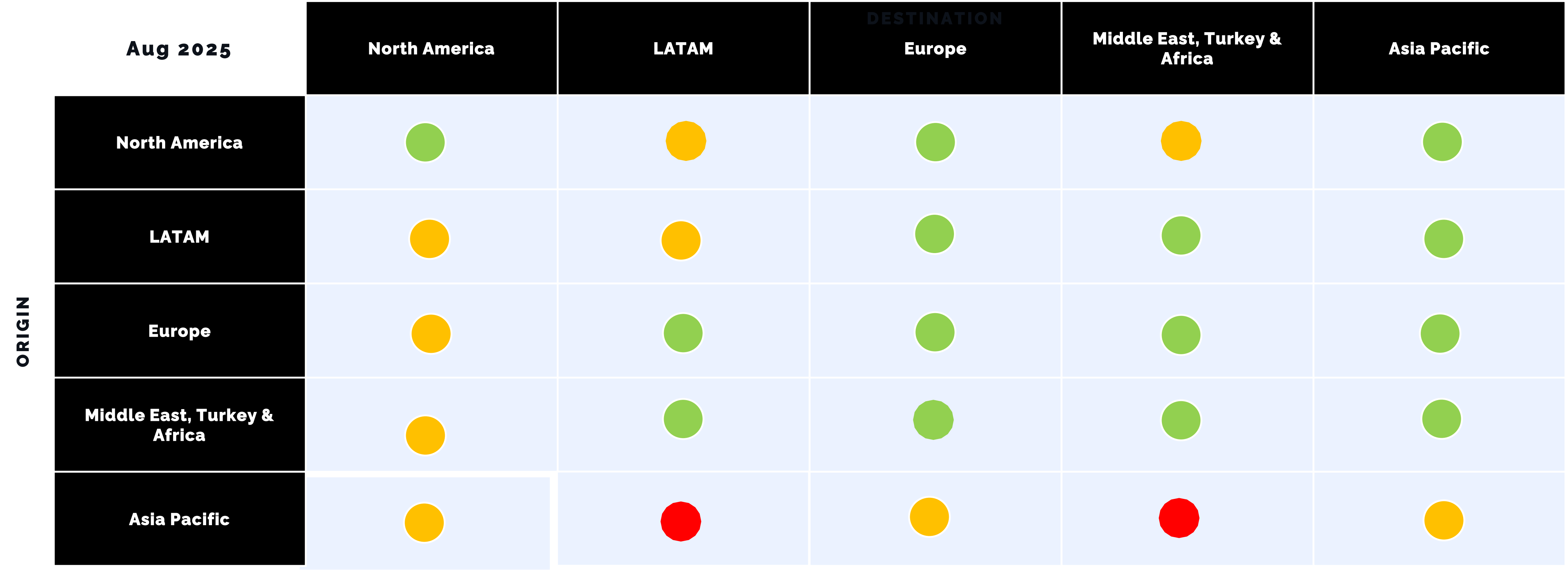
Ocean Transportation

Trade Lane Status & Impacted Trade Lanes

Aug 2025

OCEAN TRANSPORTATION

Trade Lane Status



RED
Demand has exceeded available capacity

YELLOW
Demand is higher and/or capacity is limited

GREEN
Demand and capacity are at normal levels

OCEAN TRANSPORTATION

Impacted Trade Lanes

Aug 2025 CBP & Asia Pacific

Origin	Destination	Status	Details
AP	AP		> Monsoon Season Disrupts Asia Supply Chains and Softened demand from Southeast Asia contracted intra-Asian cargo shipments. > Rates: Intra-Asia rates to remain flat in August. > Capacity: Capacity and rates may fluctuate after the August tariff deadline. > Recommend: Shippers are advised to stay flexible, as more schedule changes and capacity shifts are expected. > Port Condition: Overall operating normally without serious delay; Except Singapore and Port Klang waiting times are around 1 day which causing unreliable sailing schedules and unpredictable transit times for cargo.
China Base Ports	ALL		>Manufacturing Rebounds Slightly, but Uncertainty Lingers because of ongoing trade tensions and global uncertainties. > Rates: August rates are expected to stay at July levels, with a potential drop > Capacity: For Asia-bound routes, the supply and demand for capacity are balanced. > Recommend: 2-4 weeks pre-booking recommended > Port Condition: Overall operating normally without serious delay. Except: Main ports are congested due to bad weather and shipment disruptions.
AP	Oceania		> Growing interest from companies expanding into the Australian market is also driving up cargo demand. > Rates: Ocean freight rates are rising due to a surge in volume. > Capacity: Surge in volume and tightening capacity across key lanes, including Asia and the US. > Recommend: 2-4 weeks of pre-booking recommended. > Port Condition: Overall operating normally; Except Adelaide, Brisbane, Framantle, Melbourne, and Sydney, waiting time of 2-3 days.

OCEAN TRANSPORTATION

Impacted Trade Lanes

Aug 2025 CBP & Asia Pacific (Continued)

Origin	Destination	Status	Details
AP	LATAM	🔴	> There's a significant increase in the volume of goods being moved to Mexico and the West Coast of South America (WCSA) from Asia, with a notable rise in Chinese manufacturers establishing factories in Mexico. > Rates: Rates are expected to stay elevated through Q3 2025 > Capacity: Ocean freight space is tight. > Recommend: Recommend booking 2-4 weeks ahead of sailing. Port Condition: Overall operating normally; Argentina, Brazil, Main ports are congested due to shipment disruptions.
AP	ISC	🔴	> Market fundamentals are starting to dictate freight rates again. **> Rates remain volatile (the East India rate is higher) due to rerouting and limited vessel space.** **> Capacity: Strong demand for routes into India persists, resulting in limited available capacity. West India remains soft, while East India faces tight space.** > Recommendation: Bookings of 3-4 weeks are recommended, especially for big lot shipments. > Port condition: Overall operating normally without serious delay. Except: Mundra, Chennai, Nhava Sheva, Kolkata, waiting time 1-3 days
AP	META	🟡	**> Middle East Tensions Extend Red Sea Disruptions** **> Rates: Geopolitical Risks Keep Ocean Freight Under Pressure in H2 2025.** > Recommend: 2-3 weeks pre-booking recommended. > Port Condition: The Red Sea issue, Suez Canal accessibility, Houthis, and the Israel-Palestine conflict are expected to remain uncertain until normalcy is restored at the Suez Canal. AF: Severe berthing delays at South African ports will persist..

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Impacted Trade Lanes

August 2025 Europe

Origin	Destination	Status	Details
Europe	Asia		Space is available ex NWC and Med, with a prenotice of abt.2-3 weeks.
Asia	Europe		Space has become tighter, and rates have been increasing. We recommend to book 5-6 weeks in advance to secure space and equipment. For regular business, need to agree on allocation with the steamship lines. Many blank sailings occurring.
Europe	Africa		For most Sub Sahara Africa destinations, we recommend a prenotice of 2-3 weeks ex Europe. Congestion in many African ports, mainly South Africa, Consider extended transit times to South Africa.
Europe	Europe/Med		Recommend to book 3-4 weeks in advance. Space to Egypt remains tight. Mersin port is heavily congested, Consider using Iskenderun as alternative option.
Europe	LATAM/Mexico		Please consider 2-3 weeks booking prenotice for South America West Coast and Mexico. Space to South America East Coast is available.
Europe	North America		Space situation varies from carrier to carrier and service string. Recommend to book 3-4 weeks in advance. To US Gulf the situation is tighter. Full vessels from West Med. Currently low water situation on the St. Lawrence and surcharges apply.
Europe	MEA/ISC		Recommend to book 2-3 weeks in advance for export bookings.
Europe	Oceania		Please consider a prenotice of 2-3 weeks ex all Europe.
Europe	All		Port congestion affects ports across Europe; Congestion affecting vessels' ability to berth on time, and container yards as well as intermodal systems are congested.

Impacted Trade Lanes

August 2025 North America

Origin	Destination	Status	Details
North America	**Asia**		This service has returned to normal. Capacity is readily available for exports with some exceptions on the gulf services due to carrier blank sailings.
China Base Ports	**North America**		President Trump's trade War with the world continues to cause global shipping unrest, specifically on the Asia to US Trade. With agreement of a 90-day reprieve on 145% tariffs between China and US in mid-May, volumes rose dramatically on this Trade, and have now caused major over booking, capacity allocation issues in June from China/Asia to US. Carriers are pouncing on the instability to raise rates dramatically on the Spot/FAK market and charge Peak Season charges over $2000-$3000.
Southeast Asia	**North America**		Same as info for China to NA. SE Asia has also benefited from the Trade War by many US customers sourcing goods away from China to suppliers in SE Asia (specifically Vietnam, Thailand, and Malaysia). This also has caused many disruptions in the movement of goods for June as carriers are overbooked, roll poll of 3000-5000, blank sailings, etc. Increased charges on these lanes are consistent with China/US.
North America	**Europe**		Rotterdam and Antwerp congestion issues continue to cause delays. Niche providers are a great alternative since they operate their terminals, so congestion is not an issue. Their services are at a premium and are readily available.
North America	**LATAM**		Service offerings for this trade have improved but congestion is still a factor in Colombia/Kingston/Panama. Niche providers have introduced direct services to West Coast South America which are a great alternative for time sensitive commodities. East Coast South America is still the most challenged.
North America	**META**		Service for this trade remains status quo – Limited options and long transit times. The Red Sea sporadic attacks persist so the longer routes via Cape of Good Hope are the best option for volume to the region.
North America	**North America**		Service and capacity is available with niche providers.

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Impacted Trade Lanes

August 2025 LATAM

Origin	Destination	Status	Details
LATAM	North America		Given the shortage of empty containers and congestion at ports, it is recommended to make reservations to secure vessel space. Shippers are advised to consider alternative routes or secondary ports to avoid congestion and delays, and to maintain constant monitoring of port conditions and international trade policies that could impact exports. Freight rates from Maersk, MSC, ZIM, and ONE have remained steady; however, space is limited for New York, Miami, Los Angeles, Baltimore, Norfolk, and Seattle. There is a shortage of 20-foot container equipment in Callao. The U.S. proposal to impose a 50% tariff on Brazilian goods has contributed to a 2.4% weekly drop-in freight rates. Nevertheless, increased demand for transit cargo in South America could result in a slight rebound in rates by the end of the month. High congestion in major U.S. ports is making negotiations for this destination more difficult, and significant tariff increases are expected. Brazilian exports are being heavily impacted by the proposed U.S. tariff, and congestion is growing as exporters rush to ship as much cargo as possible before the tariff takes effect. Most ECSA–ECNA and ECSA–Gulf + Caribbean services are showing significant space availability, which is driving rates down day by day. Container availability is generally stable, although shortages persist for reefer and 20-foot dry containers at certain Brazilian ports. In Chile, winter weather and heavy swells are disrupting schedules, forcing vessels to skip ports and reducing service reliability.
LATAM	LATAM		Imports to Colombia from the United States, Canada, and Mexico maintain stable rates and require bookings approximately two weeks in advance, while routes from South America, particularly Chile and Argentina, face high rates and limited space availability. Shipments to Central and South American ports have space availability up to three weeks prior to departure, although rate increases are expected. According to major carriers (Maersk, MSC, Hapag Lloyd, Hyundai, and CMA-CGM), there is a lack of space for destinations such as Barranquilla, Cartagena, Buenaventura, and Guayaquil, requiring bookings at least three weeks in advance. At the Port of Callao (Peru), there is a shortage of 20-foot dry and reefer containers, a situation worsened by a tsunami warning and the loss of containers overboard from an Evergreen vessel, which led several ships to skip Peruvian ports, leaving cargo stuck and causing congestion. In Argentina, an increase in exports to the United States is expected due to the imposition of a 50% tariff on Brazilian products. The shortage of 20-foot dry and reefer containers affects all the mentioned routes. Meanwhile, MSC has announced a new service connecting Asia with the southern part of South America, providing Callao with more options to connect to Chile, particularly to the ports of Arica and Iquique, which will help increase volumes to Bolivia. In Chile, winter conditions and heavy swells are affecting departure schedules, forcing vessels to skip certain ports.
LATAM	Europe		At the Compas Maritime Terminal (CCTO) in Colombia, congestion has been reported due to the redirection of MSC line units, which has forced the transfer of some units to the Almaviva facilities. This situation has reduced the supply of resources from Bogotá, impacting logistics operations to Europe. According to major shipping lines, booking availability for Barcelona, Hamburg, Antwerp, and Valencia has decreased, while ocean freight rates have remained unchanged since May. There is also a shortage of 20-foot containers for exports from Callao. Freight rates have been essentially flat, with a slight 0.1% week-on-week decrease, reflecting stable demand but a lack of growth momentum. Severe congestion in Northern European ports, driven by strikes in Antwerp and low water levels on the Rhine, could support a recovery in freight rates in the future. At present, there are no problematic shipments to Europe, and shipping lines are open to punctual rate negotiations for destinations in Northern Europe and the Mediterranean. However, rates are expected to decrease.
LATAM	Asia		On July 30, 2025, an 8.8 magnitude earthquake struck Russia's Kamchatka Peninsula, triggering tsunami warnings in multiple Pacific countries, including Japan, the United States, Chile, Peru, Mexico, and Ecuador. Although the impact was less severe than expected, evacuation and emergency protocols were activated, temporarily affecting port operations in the region. Rates from Peru to Asia are decreasing due to high demand for containers in China, and it is recommended to make bookings approximately two weeks in advance. The tsunami warning, combined with the loss of containers overboard from an Evergreen vessel, caused several ships to skip Peruvian ports, leaving cargo stranded and creating congestion as delayed containers are loaded. The Port of Montevideo will now receive a regular service connecting it to Far East ports, with the Far East–India–Latin America Service operated exclusively by HMM. Rates from the River Plate to Asia are expected to rise due to increased volumes from Brazilian ports. Shipping lines are also preparing for the start of the cherry season to Asia, which is already filling available space on this trade lane, reducing capacity for general cargo exports and increasing the risk of rollovers. In Chile, winter conditions and heavy swells are affecting departure schedules, forcing vessels to skip ports and further impacting service reliability.

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August 2025 META

Origin	Destination	Status		Details
META	AP			Space and equipment are limited, There maybe delays with transshipment via Singapore and Port Klang.
META	China Base Ports			Space and equipment are available with all carriers especially for direct sailings.
META	Europe			Space is limited. It is recommended to book 2 weeks in advance.
META	LATAM			Space and equipment are limited with all carriers however bookings must be done 2 week in advance,
META	META			Space and equipment are available however bookings must be done 1 week in advance, with all carriers and Nvoccs.
META	North America			Space is generally limited. It is recommended to book 2 week in advance.