



TRANSPORT STATUS

Ocean Transportation

Trade Lane Status & Impacted Trade Lanes

September 2025



OCEAN TRANSPORTATION

Trade Lane Status

Sep 2025		DESTINATION				
		North America	LATAM	Europe	Middle East, Turkey & Africa	Asia Pacific
ORIGIN	North America	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	LATAM	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Europe	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Middle East, Turkey & Africa	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Asia Pacific	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
<div></div> <div>RED</div> <div>Demand has exceeded available capacity</div>		<div></div> <div>YELLOW</div> <div>Demand is higher and/or capacity is limited</div>		<div></div> <div>GREEN</div> <div>Demand and capacity are at normal levels</div>		

OCEAN TRANSPORTATION

Impacted Trade Lanes




Sep 2025 CBP & Asia Pacific

Origin	Destination	Status	Details
AP	AP	<div></div>	<div><div>> Carriers are launching new routes and extending existing services within the region.</div><div>> Rates: Expect stable rates in September.</div><div>> Capacity: New service launches and route extensions are increasing intra-Asia capacity.</div><div>> Recommend: Monitor rates; consider new routes for flexibility.</div><div>> Port Condition: Overall operating normally without serious delay; Except Vietnam, Singapore and Port Klang waiting times are around 1-3 days.</div></div>
China Base Ports	ALL	<div></div>	<div><div>> Manufacturing Rebounds Slightly, but Uncertainty Lingers because of ongoing trade tensions and global uncertainties.</div><div>> Rates: Rates falling on some routes (Transpacific eastbound, Asia-Europe), rising on others (South Africa, Australia).</div><div>> Capacity: Carriers adjust capacity with new routes and vessel deployments; Container repositioning is improving.</div><div>> Recommend: Monitor US-China trade tensions and geopolitical risks closely.</div><div>> Port Condition: Overall operating normally without serious delay. Except: Main ports are congested, waiting time 1-3days</div></div>
AP	Oceania	<div></div>	<div><div>> Rising volumes to Australia amid tariff shifts and peak season buildup.</div><div>> Rates: Ocean freight rates are rising due to a surge in volume.</div><div>> Capacity: Carriers adding surcharges to manage higher demand.</div><div>> Recommend: Ship early and consider fixed contracts to avoid peak season hikes.</div><div>> Port Condition: Overall operating normally; Except Adelaide, Brisbane, Framantle, Melbourne, and Sydney, waiting time of 2-3 days.</div></div>

OCEAN TRANSPORTATION

Impacted Trade Lanes

Sep 2025 CBP & Asia Pacific (Continued)

Origin	Destination	Status	Details
AP	LATAM		<ul style="list-style-type: none">> China is diversifying its trade away from the US due to ongoing tariff disputes, increasing exports to Latin America.> Rates: Expects rates to remain stable through September, following this seasonal trend.> Capacity: More vessels deployed and improved container repositioning support steady rates.> Recommend: Plan shipments amid stable rates and monitor trade trends for opportunities. <p>Port Condition: Overall operating normally; Argentina, Brazil, Main ports are congested due to shipment disruptions.</p>
AP	ISC		<ul style="list-style-type: none">> India trades with both China and Western countries, but border tensions and tariffs affect India-China trade.> Rates: Rates are stable or rising on key routes due to demand.> Capacity: Expanding capacity with new routes> Recommendation: Monitor rates and secure capacity early. <p>> Port condition: Overall operating normally without serious delay. Except: Mundra, Chennai, Nhava Sheva, Kolkata, waiting time 1-3 days</p>
AP	META		<ul style="list-style-type: none">> Easing of the Red Sea crisis restored shipping traffic to traditional routes.> Rates: After recent fluctuations, rates are expected to remain stable in September; Africa spot rates continue to climb.> Recommend: Monitor geopolitical developments; plan shipments to leverage stable rates. <p>> 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..</p>

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Impacted Trade Lanes

September 2025 Europe

Origin	Destination	Status	Details
Europe	Asia	<div></div>	Space is available ex NWC and Med, with a prenotice of abt.1-2 weeks.
Asia	Europe	<div></div>	Space has become more easily to obtain, and rates are decreasing. We recommend to book 3 weeks in advance to secure space and equipment. For regular business, we still suggest to agree on allocation with the steamship lines.
Europe	Africa	<div></div>	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. No capacity issues from Mediterranean ports.
Europe	Europe/Med	<div></div>	Recommend to book 3-4 weeks in advance. Space to Egypt remains tight. Mersin port is heavily congested, Consider using Iskenderun as alternative option. No space issues ex West Med to East Med, prenotice of 2 weeks will suffice.
Europe	LATAM/Mexico	<div></div>	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	<div><div></div><div></div></div>	Space situation ex North Europe is improving. Recommend to book 2-3 weeks in advance. To US Gulf the situation is still somewhat tighter. Full vessels from West Med, with min. prenotice 3-4 weeks. .
Europe	MEA/ISC	<div></div>	Recommend to book 2-3 weeks in advance for export bookings.
Europe	Oceania	<div></div>	Please consider a prenotice of 2-3 weeks ex all Europe.
Europe	All	<div></div>	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





September 2025 North America

Origin	Destination	Status	Details
North America	Asia		Capacity is readily available for exports to Asia. Blank sailings may impact current bookings that are scheduled 60+ days into the future as vessels and port calls are adjusted in the market. Rates remain stable.
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 but the drop in global demand has provided a brief relief. Niche providers continue to be an alternative and have not experienced the same amount of delays. Rates remain stable heading into Q4.
North America	LATAM		China has become a strong trading partner for the region which has resulted in a reduction in imports from the US to the market, but the volumes are at capacity in the local ports/terminals resulting in continued congestion and delays. Space on service from US to Latam is availabl. Customers are encouraged to book 4-6 weeks in advance.
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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September 2025 LATAM

Origin	Destination	Status	Details
LATAM	North America		<p>EC - Brazil exports to USA fell 18,5% after USA tariff policy. MSC already informed that vessels in the Trade Lane ECSA x ECNA will be changed to smaller ones, in a try to keep rates, that already suffered reduction, at the current level while chartering and port costs remain high.</p> <p>WC – Panama Channel already showing reduction in traffic, and water lowering – so low water surcharges might take place soon, affecting the already pressed WCSA x ECNA Trade Lane. After USA 50% tax announcement on WCSA copper, PE, CO and CL are already looking for alternative markets as China.</p>
LATAM	LATAM		<p>EC – In general, space in all shipping lines of all carriers. Gulf + CAR lines still showing performance of 90% in average despite US tax policy.</p> <p>Besides Brazil exports to Mexico presented 48,9% increase comparing AUG 24 to AUG 25.</p> <p>WC – Operational problems being faced in most WCSA ports: Buenaventura, with congestion inside and outside de port, Callao, dealing with port work for more cranes and equipment, and San Antonio that had even a port closure in the last week of August. Backlog and all consequent problems related are expected.</p>
LATAM	Europe		<p>EC - CMA CGM announced it will maintain modifications to its SAFRAN service connecting Europe with the east coast of South America. Starting in June 2025, the London Gateway (GBLGP) port was temporarily replaced by Southampton (GBSOU) due to congestion at the terminal. Rates ECSA x NEUR and MED slightly falling in comparison to Q2, showing a slowdown in this Trade Lane.</p> <p>WC - Maersk has temporarily diverted its AE11 service to avoid Genoa, redirecting shipments to the port of Vado Ligure during August and September. Ship diversions from Antwerp and Bremerhaven have been documented, as well as alternative routes for east-west traffic. Rates remain stable.</p>
LATAM	Asia		<p>EC - In the first half of 2025, Argentina's agricultural exports totaled 41.3 million tons, a 5,3% year-over-year increase, partly due to earlier shipments before a tax increase went into effect in June. The shipping market showed signs of recovery this Trade Lane. Brazil exporting 29,9% more to China in comparison to last year. Soy, metal and meat are the main exported products.</p> <p>WC - MSC launches the "Alpaca" service: Ningbo/Busan ↔ Callao, focusing on perishables and "ultra-fast" transits. This strengthens capacity and window options for Peruvian exporters. Line also calls San Antonio, Arica and Iquique in Chile. On the other hand, congestion inside and outside the port BUENAVENTURA limits fleet rotation, increasing logistics costs and reducing productivity.</p>

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September 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.