TRANSPORT STATUS

Ocean Transportation

Trade Lane Status & Impacted Trade Lanes

October 2025

OCEAN TRANSPORTATION

Trade Lane Status

DESTINATION

ORIGIN

Oct 2025	North America	LATAM	Europe	Middle East, Turkey & Africa	Asia Pacific
North America	🟢	🟢	🟢	🟡	🟢
LATAM	🟡	🟡	🟢	🟢	🟢
Europe	🟡	🟢	🟢	🟢	🟢
Middle East, Turkey & Africa	🟡	🟢	🟢	🟢	🟢
Asia Pacific	🟡	🟡	🟡	🟡	🔴

🔴 **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

Oct 2025 CBP & Asia Pacific

Origin	Destination	Status	Details
AP	AP	Red	> Intra-Asia remains a key growth area despite global volatility. > Rates: Expected to remain stable in October. > Capacity: No major issues with capacity and services running as usual. > Recommend: Book as usual, but watch for weather delays in early October (Use direct services to avoid delays) > Port Condition: Overall operating normally without serious delay; Typhoon disruptions affected Hong Kong and parts of China. Delays may ripple into Southeast Asia, especially around Golden Week.
China Base Ports	ALL	Yellow	>Post-Golden Week slowdown impacts manufacturing and trade flows. Strong growth to Latin America and Africa, but subdued flows to North America due to production shifts and geopolitical risks. > Rates: Potential rate increases on affected routes, particularly to Latin America and Africa; North America trade remains under pressure due to tariffs and shifting manufacturing. > Capacity: Tight capacity due to disruptions (typhoons, blank sailings) and new U.S. fees on Chinese vessels. > Recommend: Secure capacity in advance. > Port Condition: Overall operating normally without serious delay. Except: Main ports are congested, waiting time 2-5days
AP	Oceania	Red	> Demand was subdued late Q3 as many importers booked shipments earlier to avoid tariffs/disruptions. > Rates: Ocean freight rates are rising due to a surge in volume. > Capacity: Capacity matches stable demand; no major constraints reported. > Recommend: Plan shipments now to secure steady rates and monitor for any tariff or service changes. > Port Condition: Overall operating normally; Except Adelaide, Fremantle waiting time 4-5 days; Melbourne and Sydney, waiting time of 2-3 days.

OCEAN TRANSPORTATION

Impacted Trade Lanes

Oct 2025 CBP & Asia Pacific (Continued)

Origin	Destination	Status	Details
AP	LATAM	●	**> Growth driven by expanding cross-border e-commerce and companies seeking new markets amid US trade barriers. > Rates: Expected to hold steady in October. > Capacity: Capacity is adapting to growing volumes but remains balanced given steady rates. > Recommend: Plan shipments now to lock in current rates. Monitor the market for potential volatility, but expect steady pricing short term. Port Condition: No major port issues reported, but watch for usual seasonal congestion in Latin American ports.**
AP	ISC	●	**> Strong demand for tech goods and, particularly, for high-tech products and machinery from Southeast Asia, continues to drive the market. > Rates: Freight rates are not rising but remain volatile, but overall, rates could soften into Q4 2025. > Capacity: Increasing the fleet size is helping to alleviate capacity pressures, though temporary disruptions could still happen. > Recommendation: Book early for Southeast Asia exports: Due to strong demand, especially for high-tech goods, early booking is advised for Southeast Asia exports to India. > Port condition: Overall operating normally without serious delay. Except: Mundra, Chennai, Nhava Sheva, Kolkata, waiting time 1-2 days**
AP	META	●	**>Strong demand driven by South African minerals and China's manufactured goods. > Rates: Rates remain volatile, with no broad escalation but some fluctuation due to blank sailings and geopolitical uncertainties. >Capacity: Carriers are actively managing capacity, including blank sailings, to prevent a sharp decline in rates. > Recommend: Monitor geopolitical developments; plan shipments to leverage stable rates. > 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

October 2025 Europe

Origin	Destination	Status	Details
Europe	**Asia**		Space is available ex NWC and Med, with a prenotice of abt.1-2 weeks.
Asia	**Europe**		Space is available under our contracts. We recommend to book 1-2 weeks in advance. For larger volumes, we still suggest to agree on allocation with the steamship lines.
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. No capacity issues from Mediterranean ports. New PSS/congestion surcharges apply for Western Africa.
Europe	**Europe/Med**		Recommend to book 3 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**		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 ex North Europe is available under our contracts. Suggest to book 2 weeks in advance. Full vessels from West Med, with min. prenotice 3-4 weeks. .
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.

Impacted Trade Lanes

October 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. USTR fees due to take effect October 14th but no impact is expected as carriers will not be implementing any incremental fees.
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 has improved, and carriers have reinstated direct port calls to both Antwerp and Rotterdam. Rates remain stable heading into Q4, though demand for volume out of the US Gulf to Antwerp is strong impacting rates in the short term.
North America	**LATAM**		Service to Latin America is readily available especially to WCSA where carriers have injected additional services/capacity. Service to ECSA remains status quo. 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 Cease Fire Agreement between Israel and Hamas should have a positive impact on volume moving via the Suez Canal once more. We are monitoring the situation as it evolves.
North America	**North America**		Service and capacity is available with niche providers.

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October 2025 LATAM

Origin	Destination	Status	Details
LATAM	**North America**	Yellow	EC - BR exports to US decreased 20% in comparison to last month, because of US government taxes. Freight rates remain falling slightly, and MSC is already considering to lower vessel sizes in the ECSA x ECNA trade lane lines. The conversation between Lula and Trump, may change this picture. WC - North America remains a top destination for minerals, fruit and processed foods. Carriers operate direct Americas services from Callao / Paita / Ilo to US West Coast / East Coast via Panama or direct calls. In general, maritime space reservation times are increasing, and exporters are more aware that they must plan to avoid blockages or delays. This includes anticipating seasonal closures, route adjustments, etc.
LATAM	**LATAM**	Yellow	EC – Most ECSA x Gulf Lines remain full, but not at point of roll-overs. In a meeting with Hapag in Brazil, they said GS1 has been performing 90% though. Some lack of DC20s still being faced in BR, AR and UY. Cono-sur line very full, frequent roll overs by both MSK and HL. WC – Overland congestions in Callo and Buenaventura, which might affect the cargo flow to/from these ports. Chile still challenging for berth windows, despite more space in lines Intra-Latam Lines.
LATAM	**Europe**	Green	EC – Some improvements in the performance of the ECSA x NEUR lines, which drove rates to a slight increase. Reefer equipment being almost fully driven to attend fruit and protein exports. ONE came back with weekly vessels in LUX line. WC - Expect variable waiting times at Callao during peak export windows; yard utilization spikes compress vessel berthing windows and sometimes force schedule swaps. Maersk has temporarily rerouted its AE11 service, bypassing the Port of Genoa and instead directing shipments to Vado Ligure throughout. Notably, several operations have chosen to steer clear of heavily congested ports like Antwerp and Bremerhaven.
LATAM	**Asia**	Green	EC- Argentina exports to Asia keep on growing, while BR is now the main soy exporter to China, in place of USA. Freight rates slightly increasing in this trade lane, despite available space in most lines. Lack of DC20 affecting exports of raw metal to Asia. WC - Guangzhou–Chancay direct service launched in 2025, strengthening direct Asia–Peru connectivity and reducing transshipment time/costs versus routing via US/CA or Panama hubs. Reefers remain the priority — carriers and terminals have invested to serve agro-exports (blueberries, asparagus). Still, seasonal reefers tightness can occur. Availability will be tight, especially in the early to mid-October window, as harvest/export cycles. Rates remain stable.

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October 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.