



TRANSPORT STATUS
Air Transportation 2025

Rates Outlook, Trade Lane
Status & Details



AIR TRANSPORTATION

Trade Lane Status

		DESTINATION						
November		North America	LATAM	Europe	Middle East	Asia Pacific	Africa & Turkey	India
ORIGIN	North America							
	LATAM							
	Europe							
	Middle East							
	Asia Pacific							
	Africa & Turkey							
	India							

RED

Demand has exceeded available capacity

YELLOW

Demand is higher and/or capacity is limited

GREEN

Demand and capacity are at normal levels

AIR TRANSPORTATION

Rates Outlook

		DESTINATION						
November		North America	LATAM	Europe	Middle East	Asia Pacific	Africa & Turkey	India
ORIGIN	North America							
	LATAM							
	Europe							
	Middle East							
	Asia Pacific							
	Africa & Turkey							
	India							



RED
Rates are increasing



YELLOW
Rates remain even



GREEN
Rates are decreasing

Trade Lane Details

Origin	Destination	Status	Details
North America	LATAM		We are see backlogs into LATAM in particular to SCL and MEX, even express service is not gaining us space.
North America	Europe		With summer season ending we will see some capacity issues into Europe.
North America	Middle East		We are continuing to see flight cancelation and reduced capacity into the Middle East,
North America	Asia Pacific		We are seeing some carriers continue to reduce flights from China into the US. That is due to the slowdown in e-commerce.
North America	India		Capacity can still be an issue, especially for the larger shipments and we are seeing a small increase in rates. More request for express to arrive prior to the tarrif deadline.
North America	Africa & Turkey		Capacity is returning to normal levels with the return of passenger demand and added PAX flights.

Trade Lane Details

Origin	Destination	Status	Details
Europe	North America		Several transatlantic flights are cancelled during winter schedule, starting in October. Holiday season is known for high demand. Capacity will be constrained as of November. Freighter connection capacity is volatile and subject to demand fluctuations caused by tariff war disruptions.
Europe	Europe		Many short haul routes are serviced with narrowbody equipment, Alternatively, Road Feeder Service can cover the demand.
Europe	Middle East		Rates are stable, capacity remains available both on passenger aircrafts as well as on regular freighter service. Middle East carriers are ambitiously growing capacity over the next years.
Europe	Asia Pacific		Outbound capacity remains available; Many Asian carriers still see an imbalanced demand for backhaul flights. Rates hold a low level, Due congestion in West European region, there is additional capacity deployed ex airports in Eastern Europe airports.
Europe	LATAM		Passenger rates have stabilized while we still have limited trans-Atlantic maindeck capacity available in the market. Significant gaps with rates on passenger aircrafts. Deferred flights are available at lower costs.
Europe	Africa & Turkey		Rates are at a stable level, capacity is available out of Europe, demand is expected to remain stable for next months.
Europe	India		New maindeck capacity has been added to the market, as backhaul demand continues increasing. For now, ample capacity is available.

Trade Lane Details

Origin	Destination	Status	Details
LATAM	LATAM		Rates are stable, capacity is currently still available.
LATAM	North America		Rates are stable, capacity is currently still available.
LATAM	Middle East		Rates are stable, capacity is currently still available
LATAM	Asia Pacific		Demand and Rates are increasing , limited capacity
LATAM	EUROPE		Rates are stable, capacity is currently still available
LATAM	Africa & Turkey		Rates are stable, capacity is currently still available

Trade Lane Details

Origin	Destination	Status	Details
Asia	USA		Demand outpacing capacity levels with rates trending upwards
Asia	Europe		Demand is up compounded with Red Sea crisis pushing rates Northwards.
Asia	Middle East		Adequate capacity but transshipment traffic putting pressure on available capacity and rates
Asia	Intra-Asia & India		Adequate capacity but minimal WB capacity available. Asian carriers displacing lower yielding Intra Asia volumes for higher yielding Trans-Pacific loads via their hubs putting pressure on rates
Asia	Africa & Turkey		Airlines like ET/TK increasing capacity to Africa/Turkey, but demand and rates outstrip capacity for the time being
Asia	LATAM		Minimal capacity available ex APAC and first leg access to EU/US a major challenge. Rates to LATAM are rocketing and continues to be a lucrative segment ex APAC.

Trade Lane Details

Origin	Destination	Status	Details
Middle East	LATAM		The combination of decreased capacity from the Middle East and increased demand in Latin America suggests potential upward pressure on rates.
Middle East	North America		Elevated rates and dynamic capacity adjustments, influenced by e-commerce growth, geopolitical tensions, and disruptions in maritime shipping routes. Strategic planning and flexibility are essential to navigate this complex landscape effectively.
Middle East	Europe		Spot rates from the UAE to Europe are falling as carriers offer more available space.
Middle East	Asia Pacific		Elevated rates and dynamic capacity adjustments, influenced by e-commerce growth, geopolitical tensions, and disruptions in maritime shipping routes. Strategic planning and flexibility are essential to navigate this complex landscape effectively.
Middle East	India		Middle Eastern carriers are expanding their freighter fleets and optimizing routes to meet the growing demand on key trade lanes, including those connecting to India.
Middle East	Africa & Turkey		The Middle East and Africa is experiencing moderate growth, influenced by infrastructure investments, geopolitical factors, and evolving trade dynamics.

Trade Lane Details

Origin	Destination	Status	Details
Africa & Turkey	LATAM		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal
	North America		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal
Africa & Turkey	Europe		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal
	Asia Pacific		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal
	India		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal
	Middle East		There are no further restrictions due to Covid-19. Flight frequencies and capacities are back to normal