



TRANSPORT STATUS

Ocean Transportation

Trade Lane Status & Impacted Trade Lanes

Nov 2025



Trade Lane Status

Nov 2025		North America	LATAM	DESTINATION Europe	Middle East, Turkey & Africa	Asia Pacific
ORIGIN	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

Nov 2025 CBP & Asia Pacific

Origin	Destination	Status	Details
AP	AP		> November, starting the holiday buildup, rate increases, and limited space for late bookings are expected. > Rates: Rates expected to remain steady in November. > Capacity: Capacity aligned with cargo volumes and further capacity additions are expected as trade volumes recover. > Recommend: Maintain schedule flexibility to navigate weather-related disruptions. > Port Condition: Overall operating normally without serious delay; Typhoon disruptions may delay ripple into Southeast Asia ports.
China Base Ports	ALL		>Market balanced after Golden Week adjustments. Chinese e-commerce demand and pre-tariff shipping are driving rates higher. > Rates: Market remains stable with steady capacity and rates. > Capacity: Tight capacity due to disruptions (typhoons, blank sailings) and new U.S. fees on Chinese vessels. > Recommend: Secure capacity in advance. Early booking is recommended before the December holidays. > Port Condition: Overall operating normally without serious delay. Except: Main ports are congested, waiting time 2-4days
AP	Oceania		> Asia-Oceania shipping lanes remain stable due to seasonal demand, > Rates: Freight from Asia remains generally stable. > Capacity: Equipment shortages and rising holiday demand are limiting availability and reliability. > Recommend: Equipment availability for exports is challenging. Early booking is recommended. > Port Condition: Overall operating normally; Except Adelaide and Sydney, waiting time is 6-8 days; Brisbane, Melbourne, waiting time of 2-4 days.

OCEAN TRANSPORTATION

Impacted Trade Lanes

Nov 2025 CBP & Asia Pacific (Continued)

Origin	Destination	Status	Details
AP	LATAM		> The market is influenced by excess capacity and steady cargo volumes, which have suppressed vessel utilization. > Rates: Rates are expected to decline further in November due to persistent overcapacity. > Capacity: Carriers are monitoring market balance as China expands exports to alternative markets. > Recommend: Plan shipments ahead to avoid potential congestion or seasonal demand spikes. 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		>Market activity has been influenced by the easing of the Red Sea crisis, which allows carriers to resume normal routing. > Rates: Moderate rate stability is anticipated in November after steep October declines. >Capacity: Carriers are actively managing capacity, including blank sailings, to prevent a sharp decline in rates. > Recommend: Monitor geopolitical developments, as these could affect route coverage and scheduling. > Port Condition: Port efficiency is expected to improve as trade volumes normalize post-holiday and post-crisis.

OCEAN TRANSPORTATION

Impacted Trade Lanes

November 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.
Europe	Port Congestion		Port congestion has slightly improved. Average delays are 2-4 days in most ports, except Genoa and Felixstowe which remain strongly congested.

Impacted Trade Lanes

November 2025 North America

Origin	Destination	Status	Details
North America	Asia		Capacity continues to be readily available for exports to Asia from all US origins. The USTR fees took effect October 14th, but no impact or additional cost was incurred by the shippers. Rates have remained stable throughout Q4 and are projected to continue heading into 2026.
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		Capacity is open for exports from the USEC to North Europe, but the US Gulf (particularly Houston) is experiencing a tightening of capacity due to low water levels in the Houston Channel. This has resulted in reduced tonnage on the Transatlantic vessels departing Houston. Rates remain stable despite the increase in demand.
North America	LATAM		Services to Latin America have open capacity. WCSA is an area of opportunity with new services coming into fold in Q3. Service to ECSA remains status quo. Customers are encouraged to book 4-6 weeks in advance.
North America	META		Service for this trade remains inconsistent. Rates and capacity availability vary by destination. Limited options and long transit times continue to be the challenge. Only a handful of carriers have indicated that they will ship via the Suez canal as a result of the cease fire agreement between Israel and Hamas.
North America	North America		Service and capacity is available with niche providers.

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November 2025 LATAM

Origin	Destination	Status	Details
LATAM	North America		EC – While exports from Brazil to US have fallen 22%, the exports to Mexico grew 43,8%. Freight rates remain falling in this trade lane, despite some increase in the performance: vessels sailing at 90%, as per Hapag Lloyd's info. WC - Northbound services from Chile/Peru/Ecuador/Colombia to the U.S. East and West Coasts have been experiencing delays and reduced effective capacity because congestion in Central America and some East Coast South America ports disrupts vessel rotations, so ships sail fuller or off-window. This increases costs and lengthens actual transit times.
LATAM	LATAM		EC - It's a good moment for Intra-Latam businesses with ECSA as POLs. Most shipping lines have immediate open space, and no big delays have been occurring lately. Rates keep stable and a slight increase in the shipments to Gulf is noticed. WC - There's on-and-off congestion on the west coast of South America northbound because many services call at Central America, where terminals are busy (70–80%), so actual transit times are longer, and space is tighter than published.
LATAM	Europe		EC - A new direct route from Brazil (São Paulo → Recife → Brussels) has been launched with the aim of improving the shipment of fruit and other perishable goods to Europe. Capacity, frequencies, and connectivity are being strengthened in Latin AmericaThe global reefer market is tight: there is more demand than available containers, so equipment availability is a bigger issue right now than the base freight. Booking equipment in advance is key. WC - Schedule reliability on the Europe–South America corridor has improved slightly, but it's still below 55%, so you should continue to request the actual ETA and not rely only on the published one.
LATAM	Asia		EC – Rates ranging USD 300/40 are seeing in ECSA x China BP. Despite cotton and soy breaking records of shipments, most shipping lines got open space. Some transshipment congestions remain in ECSA x India Sub services and ECSA x East Asia. WC - CMA CGM has launched the 2025 "Cherry Express" service from Chile to China, offering a fast 23-day transit from San Antonio to Shanghai. To run it, the line will temporarily adjust its ACSA 1 and M2X service itineraries. Direct routes from Guangzhou to Chancay are now operating, opening a faster corridor from China to northern Lima (reducing transit time by about 10 days approx).

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November 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.