

# FrachtNEWS

Logistics  
Market  
Report

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## New Port Fee Policy to Reshape Supply Chain Strategy in the U.S.

The U.S. Trade Representative (USTR) is taking decisive steps to bolster the transport operations and shipbuilding industries by finalizing new port fee regulations that will affect all Chinese-built vessels calling at American ports. The USTR has announced two phases designed to “balance the need for action and the importance of limiting disruption for U.S. exporters” (Office of the United States Trade Representative, 2025). The first phase will begin after a 180-day grace period, until October 14, 2025, and will introduce service fees based on net tonnage or a container-based fee. Shipowners who commit to U.S.-built replacements may receive up to a three-year surcharge suspension, incentivizing investment in domestic manufacturing. The second phase, delayed for three years, includes restrictions on transporting liquified natural gas (LNG) via foreign-built ships. The USTR is also seeking public input on proposed tariffs for cargo handling equipment, including ship-to-shore cranes, in alignment with recent executive priorities focused on

maritime security and infrastructure. Public comments and hearing participation requests are due by May 8, 2025. Ambassador Greer emphasized the importance of these actions for national and economic resilience, stating, “Ships and shipping are vital to American economic security and the free flow of commerce (Office of the United States Trade Representative, 2025). These changes underscore the delicate balance between protecting national interests and maintaining efficient global trade. Logistics firms must adapt to evolving cost structures and potential supply chain adjustments as the industry navigates this new landscape.

**Source:** Office of the United States Trade Representative. (2025, April 17). *USTR Section 301 Action on China's Targeting of the Maritime, Logistics, and Shipbuilding Sectors for Dominance*. Office of the United States Trade Representative. <https://ustr.gov/about/policy-offices/press-office/press-releases/2025/april/ustr-section-301-action-chinas-targeting-maritime-logistics-and-shipbuilding-sectors-dominance>

# U.S. Announces Temporary 90-day Tariff Suspension



In a significant shift in U.S. trade policy, a 90-day suspension of reciprocal tariffs has been announced for all countries except China, effective April 9, 2025. This pause, impacting the logistics and supply chain sectors, aims to foster negotiations and stabilize global trade dynamics. The decision reverses earlier commitments to maintain high tariffs, offering temporary relief to industries reliant on international imports. Officials of the new U.S. administration clarified that Mexico and Canada “will continue to be tariffed at 25%, unless they are compliant with the US-Mexico-Canada Agreement, in which case they won’t face tariffs” (Buchwald & Liptak, 2025). The logistics sector must prepare for ongoing negotiations during this 90-day window.

**Source:** Buchwald, E., & Liptak, K. (2025, April 9). *Trump announces 90-day pause on ‘reciprocal’ tariffs with exception of China.* CNN Business. <https://www.cnn.com/2025/04/09/business/reciprocal-tariff-pause-trump/index.html>

# Container Shipping Faces Unprecedented Volatility Amid Trade Policy Shifts

The container shipping industry faces a challenging landscape marked by unpredictable demand and operational hurdles, according to recent insights from maritime analyst Drewry. Simon Heaney, senior manager of container research at Drewry, highlighted the severity of the current environment, stating, “The outlook for container shipping is more uncertain now than it was at the onset of the Covid virus” (Goldstone, 2025). This uncertainty stems from volatile trade policies and shifting global dynamics, creating a cautious approach among businesses hesitant to invest amid such unpredictability. As the industry braces for these shifts, flexibility and proactive planning will be critical for shippers aiming to mitigate disruptions and capitalize on emerging opportunities in the global market.

**Source:** Goldstone, C. (2025, April 24). *Outlook for container shipping ‘more uncertain now than at the onset of Covid.’* The Loadstar. <https://theloadstar.com/outlook-for-container-shipping-more-uncertain-now-than-at-the-onset-of-covid/>





## Global Market

Ocean Freight

## Heightened Red Sea Shipping Risks as Houthis Target Specific Companies



The Houthi militia, based in Yemen, has escalated tensions in the Red Sea by declaring container ships carrying cargo for certain companies as valid targets. This development intensifies the ongoing disruptions to one of the world's critical maritime trade routes, posing challenges for global logistics and supply chain operations. According to a Houthi spokesperson, "[your] fleet will be prohibited from transiting the Red Sea, Bab al-Mandab Strait, Gulf of Aden, Arabian Sea, and the Indian Ocean" (Whiteman, 2025). As shipping companies navigate these geopolitical and operational risks, the emphasis remains on ensuring resilience and adapting routing strategies to safeguard the flow of global trade.

**Source:** Whiteman, A. (2025, April 28). *New Houthi warning to shipping as rebel group targets specific companies*. The Loadstar. <https://theloadstar.com/new-houthi-warning-to-shipping-as-rebel-group-targets-specific-companies/>

## Global Market

Air Freight

## IATA Signals Steady Growth Ahead for Air Cargo Sector

Despite trade tensions and tariff discussions, IATA remains optimistic about global air cargo, projecting a stable year ahead. The majority of trade remains untouched by new tariffs, opening opportunities for rerouted flows and emerging markets. "87% of global trade is unaffected by tariffs. There are opportunities for new markets," said Maja Marciniak, IATA's senior economist (Jeffrey, 2025). Forecasts include a 6% increase in cargo tonne-kilometres, with the Middle East leading growth. While risks remain, particularly from geopolitical factors, key indicators such as stable yields and resilient demand suggest air freight remains on a solid path forward.

**Source:** Jeffrey, R. (2025, April 15). *IATA maintains positive cargo outlook*. Air Cargo News. <https://www.aircargonews.net/iata-wcs/iata-maintains-positive-cargo-outlook/1079981.article>



## Air Freight Faces Uncertainty as Global Trade Shifts

Amid new U.S. tariffs and growing geopolitical risks, the air freight industry is exercising caution. Speaking at IATA's World Cargo Symposium, Alina Fetisova of the International Trade Centre noted a slowdown as companies adjust to shifting trade conditions. "We are witnessing a slower pace of growth, with the tariffs having put the industry in a wait-and-see moment," she said (Whiteman, 2025).

With ongoing geopolitical tensions and changing regulations, air cargo stakeholders are closely monitoring developments before making strategic decisions in what's being called a new phase of "slowbalisation."

**Source:** Whiteman, A. (2025, April 15). *Air cargo watches and waits as trade chaos creates 'slowbalisation'*. The Loadstar. <https://theloadstar.com/air-cargo-watches-and-waits-as-trade-chaos-creates-slowbalisation/>



## Tariff Tensions Add Pressure to Freighter Fleet Renewal

The future impact of U.S. tariffs on freighter aircraft production remains uncertain, particularly as the industry faces delays in fleet modernization. "Nobody can say with any certainty at this stage just quite what the impact will be," (Jeffrey, 2025) said Willie Walsh, IATA director general, highlighting the complexity of global supply chains. As China plays a significant role in the production of aircraft parts, the tariffs could exacerbate existing supply chain challenges. With aging aircraft limiting efficiency and capacity gaps growing due to delivery delays, supply chain alignment and strategic planning will be essential to support future cargo growth.



**Source:** Jeffrey, R. (2025, April 15). *US tariffs' impact on freighter manufacturing unclear*. Air Cargo News. <https://www.aircargonews.net>



## Global Market

Breakbulk

## Stable Multipurpose Shipping Index Defies Broader Freight Market Trends



The multipurpose shipping sector has shown resilience amid global trade uncertainties, according to recent industry analysis. While other freight markets are seeing downward pressure, Toepfer noted, “In comparison to the freight market, which is experiencing significant challenges, the TMI Index is performing better than expected” (Kershaw, 2025). The broader operating environment remains cautious due to regulatory uncertainty. Ongoing discussions around U.S. import tariffs and the potential for new levies on Chinese-built vessels calling at U.S. ports have left stakeholders in a holding pattern. Looking forward, Toepfer’s projections indicate potential growth, though the market remains sensitive to evolving trade policies and global economic shifts. The multipurpose shipping sector’s adaptability will be critical as it responds to these dynamics. From a logistics strategy standpoint, this data signals that while volatility exists at the policy level, multipurpose shipping remains a relatively stable and resilient segment.

**Source:** Kershaw, D. (2025, April 7). Toepfer Transport’s monthly multipurpose shipping rate update. Heavy Lift & Project Forwarding International. <https://www.heavyliftpf.com/sectors/toepfer-transport-monthly-multipurpose-shipping-rate-update/21174.article>

## Asian Market

Ocean Freight



## Tariff Policy Volatility Hinders Trans-Pacific Shipping Agreements

Annual service contract negotiations between ocean carriers and major US importers are facing significant delays due to uncertainty surrounding ongoing tariff policies. Traditionally, ocean carriers and major U.S. importers wrap up annual negotiations by early April, with contracts effective from May 1. However, this year, discussions have been pushed back by at least two weeks as stakeholders navigate the unpredictable tariff landscape affecting the U.S.’s busiest trade route. “While ocean carriers and their largest retail customers are continuing to disagree over pricing

levels in the 2025–26 service contract negotiations, the tariff uncertainty is causing hesitation among shippers who need to make a final decision on the volumes they will import as part of the so-called minimum quantity commitments (MQCs) that must be adhered to during the life of the contracts” (Mongelluzzo, 2025). If negotiations continue to drag, carriers are expected to temporarily extend existing contracts until new agreements are finalized. However, industry experts warn that prolonged delays could lead to a surge in contract finalizations and a potential spike in rates come May.



**Source:** Mongelluzzo, B. (2025, April 24). *Tariff uncertainty disrupting timeline for trans-Pacific service contract talks*. Journal of Commerce. <https://www.joc.com/article/tariff-uncertainty-disrupting-timeline-for-trans-pacific-service-contract-talks-5990760>



Asian Market

Ocean Freight

## Carriers Scale Back Transpacific Sailings Amid Shifting Trade Volumes



The container shipping industry is facing significant disruptions along Transpacific routes, with a sharp rise in blank sailings impacting trade between Asia and North America. This increase in blank sailings reflects a cautious approach by shipping lines and cargo owners. Alan Murphy, CEO of Sea-Intelligence, noted, “The current political climate is extremely volatile and given that tariffs are being imposed and suspended on an almost daily basis, we assume that both the shipping lines and cargo owners are only adjusting their short-term supply chains for now and waiting for things to settle down before making longer-term network adjustments” (Schuler, 2025).

This strategy highlights the industry’s focus on flexibility amid uncertainty. Shipping lines are prioritizing short-term operational adjustments to maintain efficiency, while cargo owners are reevaluating supply chain plans to mitigate disruptions. As the industry navigates these challenges, stakeholders are closely monitoring market trends to inform future network decisions.

**Source:** Schuler, M. (2025, April 21). *Massive Surge in Transpacific Blank Sailings Amid U.S.-China Trade Tensions*. gCaptain. <https://gcaptain.com/massive-surge-in-transpacific-blank-sailings-amid-u-s-china-trade-tensions/>



Asian Market

Air Freight

## Postal Disruption Highlights Rising Trade Tensions



Amid escalating trade friction, a major postal service in Asia has suspended shipments of goods to the U.S., citing new tariff rules and the elimination of de minimis exemptions. The move comes with sharp criticism, calling the U.S. “unreasonable” and “bullying” in its policy shift (Lennane, 2025). Surface mail was halted immediately, with air mail set to stop later this month for postal items from China and Hong Kong. While documents can still be sent, the disruption is expected to impact e-commerce flows and push logistics providers to explore alternate routing options across Asia.

**Source:** Lennane, A. (2025, April 16). *Hongkong Post suspends services to 'unreasonable' and 'bullying' US*. The Loadstar. <https://www.theloadstar.com>



## North America Market

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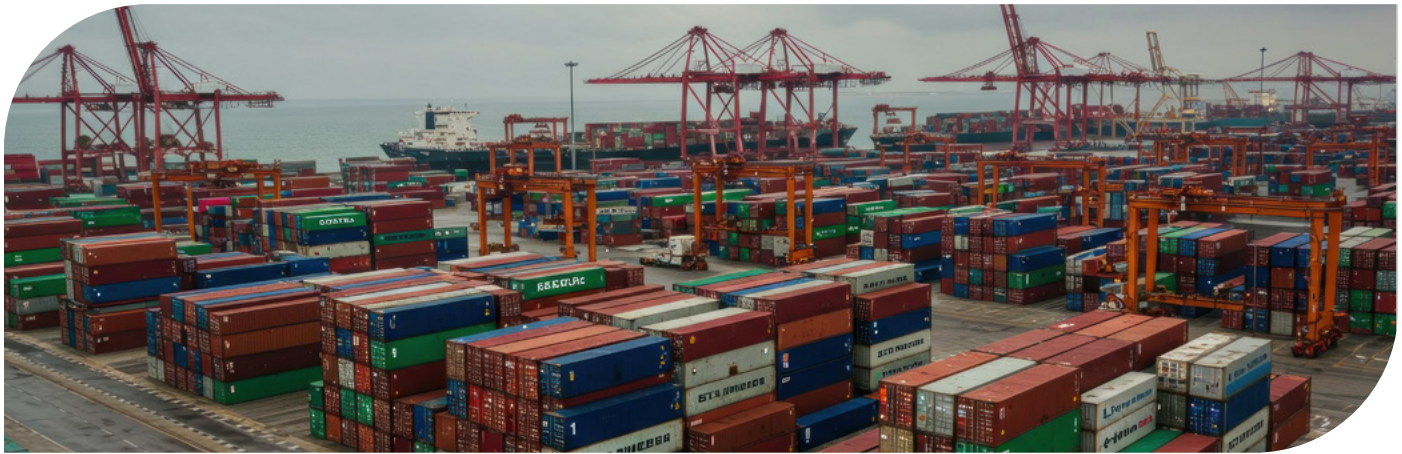


## US Exporters Pivot To New Markets Amid Ongoing Tariff Disruptions

U.S. exporters are experiencing increased cancellations from Chinese buyers due to changing trade conditions, leading to a shift toward markets in Southeast Asia. This change is influencing logistics strategies and export patterns across trans-Pacific trade. Peter Friedmann, executive director of the Agriculture Transportation Coalition, stated, "A lot of the steamship lines are canceling, blanking, delaying, [and] changing routes," (Robb, 2025). As exporters redirect shipments to new markets, logistics teams work to ensure reliable service and adapt to evolving trade patterns.

The shift reflects efforts to navigate global market challenges, with professionals aiming to minimize disruptions and maintain stable supply chains. These adjustments underscore the need for flexible logistics solutions in response to dynamic international trade demands.

**Source:** Robb, L. (2025, April 16). *US exporters see rise in canceled orders from Chinese buyers amid trade war*. Journal of Commerce. <https://www.joc.com/article/us-exporters-see-rise-in-canceled-orders-from-chinese-buyers-amid-trade-war-5986165>



## North America Market

Air Freight

## Logistics Giant Shifts Strategy with Larger Aircraft and Overnight Focus

A major U.S. e-commerce logistics operator is retooling its air network, reducing short-haul flights in favor of larger aircraft and longer routes to better serve third-party freight customers. "Larger planes give the retailer more room beyond internal needs and facilitate bulk shipments," (Kulisch, 2025). according to the Chaddock Institute's latest report. With more overnight departures and expanded hub activity, the shift supports regional fulfillment strategies and increases aircraft utilization. The focus now leans toward capacity optimization rather than expanding airport reach.

**Source:** Kulisch, E. (2025, April 7). *Amazon airline prioritizes bigger aircraft to handle third-party cargo*. FreightWaves. <https://www.freightwaves.com>



## Latin American Market

Ocean Freight



## Panama-U.S. Security Cooperation Renewed Under New Memorandum

A recent security agreement between Panama and the United States has stirred discussions within the logistics and maritime industries, as stakeholders weigh its implications for the Panama Canal, a critical artery for global trade. “Panamanian officials refer to it as a ‘memorandum of understanding’ that remains temporary and can be terminated at will” (Latin American Post Staff, 2025). The pact aims to enhance joint security efforts without compromising the canal’s neutrality or Panama’s sovereignty, as established by the 1977 Torrijos-Carter Treaties. As Panama navigates this complex geopolitical environment, balancing necessary security partnerships with national autonomy remains a central challenge.

**Source:** The Latin American Post Staff. (2025, April). *Panama Accord sparks debate on expanded U.S. presence.* LatinAmerican Post. <https://latinamericanpost.com/analysis-en/panama-accord-sparks-debate-on-expanded-u-s-presence/>



## CMA CGM Strengthens South American Operations with Majority Stake in Santos Brasil



CMA CGM, a global leader in maritime transport, has significantly expanded its footprint in South America by acquiring a majority stake in Santos Brasil Participações S/A, the operator of Tecon Santos, the continent’s largest container terminal. The transaction, finalized on April 24, 2025, positions CMA CGM as the controlling shareholder with a 51% stake, enhancing its operational influence at the Port of Santos, a critical hub handling approximately 40% of Brazil’s containerized cargo. Rodolphe Saadé, CEO of CMA CGM Group, emphasized the strategic importance of the acquisition, stating it “represents a strong commitment to strengthen the company’s relationship with Brazil and supporting its economic growth” (MI News Network, 2025). CMA CGM aims to boost the terminal’s capabilities and enhance services for exporters and importers throughout Brazil.

**Source:** MI New Network. (2025, April 26). *CMA CGM Acquires Majority Stake In South America’s Largest Container Terminal.* Marine Insight. <https://www.marineinsight.com/shipping-news/cma-cgm-acquires-majority-stake-in-south-americas-largest-container-terminal/>



## Latin American Market

Ocean Freight

## Rotterdam Port Congestion Impacts Latin American Trade

The Port of Rotterdam, Europe's largest maritime hub, is grappling with significant congestion, creating logistical hurdles for Latin American exporters. Since early February 2025, disruptions stemming from a labor dispute at the Hutchinson Port Delta II terminal have rippled through global supply chains. The strike, which began on February 9, 2025, disrupted operations, and despite a return to normalcy by March 12, vessels continue to face extended wait times, averaging seven days for servicing. To mitigate losses, experts recommend proactive measures. Miguel Segovia, a transport and insurance attorney, advises, "It's important to notify the insurer of the situation, inform the carrier of potential damage, and coordinate joint inspections at destination" (Araya & Cía, 2025). Such steps ensure proper documentation for claims. While a tentative labor agreement was reached in March, its ratification remains uncertain, leaving exporters cautious about future stability. Latin American exporters are urged to stay vigilant and adaptable to maintain supply chain resilience in this volatile environment.



**Source:** Araya & Cía. (2025, April 22). Congestion at the port of Rotterdam is causing logistical and legal impacts for Latin American exporters. Araya & Cía. <https://www.araya.cl/2025/04/congestion-en-puerto-de-rotterdam-genera-impactos-logisticos-y-legales-a-exportadores-de-latinoamerica/>

## European Market

Ocean Freight



## Europe Braces for Potential Chinese Import Surge



**Source:** Knowler, G. (2025, April 16). Europe on alert to track any wave of diverted Chinese imports. Journal of Commerce. <https://www.joc.com/article/europe-on-alert-to-track-any-wave-of-diverted-chinese-imports-5986038>

As U.S. tariffs disrupt cargo bookings from China, European markets are preparing for a potential influx of redirected goods. The European Commission has established an Import Surveillance Task Force to monitor containerized imports from China. According to Olof Gill, a trade spokesperson for the European Commission, "The commission is monitoring imports closely to ensure that it detects in good time any potential increase in imports due to trade diversion" (Knowler, 2025). A potential surge could exacerbate existing port congestion in North Europe and Mediterranean gateways, where delays are already caused by full container yards, crane maintenance, and inland transport disruptions. Equipment imbalances may also arise if carriers adjust sailing schedules to prioritize other regions, a challenge seen in past disruptions like the Red Sea crisis. Europe's proactive monitoring and strategic trade measures aim to balance market stability with the challenges of shifting global trade dynamics.

# Global Shipping Takes Strides Toward Sustainability

The International Maritime Organization (IMO) has taken a significant step toward decarbonizing the shipping industry, following the conclusion of the 83rd Maritime Environment Protection Committee (MEPC83) meeting in London. Despite notable disagreements among member states, a framework agreement introducing fuel intensity standards and a carbon pricing mechanism was reached, setting the stage for global action toward net-zero emissions by 2050. Mark Brownstein, senior vice president of energy at the Environmental Defense Fund, emphasized the framework's potential, stating, "While it's not everything one could have wanted, it does put a price on carbon and has the potential to materially jumpstart the development and deployment of the next generation of fuels" (Knowler, 2025). Data from Xeneta and Marine Benchmark highlights the urgency of these measures driven by longer routes around the Cape of Good Hope to avoid Red Sea conflicts. This underscores the need for robust global regulations to curb emissions while maintaining trade efficiency.



**Source:** Knowler, G. (2025, April 18). *IMO deal on fuel intensity, pricing hailed as 'major step forward.'* Journal of Commerce. <https://www.joc.com/article/imo-deal-on-fuel-intensity-pricing-hailed-as-major-step-forward-5986720>

# Collaboration Fuels Progress Toward Sustainable Aviation



Achieving widespread use of sustainable aviation fuel (SAF) in air cargo relies heavily on strong partnerships across the value chain. As one panelist shared during the 2025 World Cargo Symposium, "It's collaboration," referring to joint efforts in SAF investment, testing, and long-term supply agreements (Jeffrey, 2025). Industry leaders emphasized that working together not only supports SAF development but also boosts awareness among shippers. While demand is projected to exceed supply through 2030, unified action remains critical to closing the gap and hitting decarbonization goals.

**Source:** Jeffrey, R. (2025, April 16). *Partnerships are essential to SAF adoption.* Air Cargo News. <https://www.aircargonews.net>