



FrachtNEWS Logistics Market Report



Ocean Freight





Chinese Carriers Adjust Routes to Circumvent Upcoming U.S. Port Fees

hinese shipping lines are making strategic service adjustments to reduce exposure to upcoming U.S. port fees targeting Chinese-built, -operated, or -owned vessels. "From 14 October, these ships face a \$50 per net tonne fee; while Chinese-built vessels operated by non-Chinese carriers must pay \$33 per tonne or \$250 per container, whichever is higher" (Whiteman, 2025). OOCL, a subsidiary of Cosco, has announced the launch of its Transpacific Latin Pacific 8 (TLP8) service, linking Qingdao directly to Ensenada and Manzanillo, Mexico. While the company framed the route as a network expansion, industry observers suggest it may be strategically designed to bypass U.S. port calls. Vespucci Maritime CEO Lars Jensen commented that the move should "likely be seen in the context of the USTR fees on Chinese-operated vessels," adding that more services could directly link Asia to Canada or Mexico, thereby avoiding U.S. port calls altogether (Whiteman, 2025). The realignment is not limited to Chinese carriers. Non-Chinese operators have

also indicated their ability to reallocate vessels to avoid the charges. Market impacts could extend beyond vessel scheduling. According to eeSea chief analyst Destine Ozuygur, the fees may trigger growth in intra-regional trade routes, with carriers potentially shifting capacity toward South American markets or dissolving partnerships in unfavorable conditions. For supply chain stakeholders, these developments signal a potential reshaping of North American trade flows. Shippers may see increased reliance on Canadian and Mexican ports, alongside a rise in cross-border trucking and rail to feed U.S. markets. The adjustments underscore the industry's agility in adapting to geopolitical trade measures while maintaining service continuity.

Source: Whiteman, A. (2025, August 11). Chinese carriers rejig schedules to avoid US port calls as fees loom. The Loadstar.

https://theloadstar.com/chinese-carriers-rejig-schedules-to-avoid-us-portcalls-as-fees-loom/





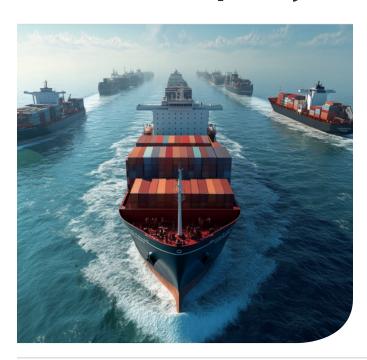
US and China Hold Off Tariff Increases, Easing Supply Chain Pressure

he United States and China have agreed to extend their tariff truce for an additional 90 days, providing critical stability for importers preparing for the peak holiday season. This move prevents previously scheduled surges in duties that could have disrupted supply chains for electronics, apparel, and toys. The current agreement locks U.S. tariffs on Chinese imports at 30% and Chinese duties on U.S. goods at 10% through November 10, averting a near-trade embargo scenario. Former U.S. trade official Ryan Majerus noted the extension "will undoubtedly lower anxiety on both sides as talks continue, and as the U.S. and China work toward a framework deal in the fall" (Hunnicutt et al., 2025). For supply chain professionals, the truce provides time to coordinate procurement, shipping, and inventory strategies ahead of peak seasonal demand, helping minimize disruptions. While long-term trade relations remain complex, this temporary stability supports predictability in global commerce between the world's two largest economies.



Source: Hunnicut, T., Shalal, A., & Cash, J. (2025, August 12). US, China extend tariff truce by 90 days staving off surge in duties. Reuters. https://www.reuters.com/world/china/us-china-extend-tariff-truce-by-90days-staving-off-surge-duties-2025-08-12/

Direct Loops Gain Momentum as Carriers Rebalance Capacity in Emerging Trades



s supply and demand recalibrate across liner networks, carriers are reevaluating when niche, transshipment-heavy corridors are ready for pointto-point coverage. Direct loops can stabilize transit times, reduce variability caused by multi-leg handoffs, and create a differentiated product in developing corridors. "New direct connections are the obvious starting point, but carriers also have the possibility to link in feeder hubs and partially piggyback on other direct routes" (Masters, 2025). With newbuild deliveries continuing and fleets highly mobile, reallocating tonnage into targeted direct services can help absorb surplus capacity while improving customer value. Early adopters can lock in operational benefits while carriers balance utilization, equipment cycles, and schedule integrity across newly linked geographies.

Source: Masters, J. (2025, August 21). A sea of opportunities exists to swap transshipment for direct services. Journal of Commerce. https://www.joc.com/article/a-sea-of-opportunities-exists-to-swaptransshipment-for-direct-services-6066868





Air Freight

Air Cargo Stability Tested as Demand Growth Slows

lobal air freight prices remain steady due to airlines" careful capacity management, yet slowing demand poses a challenge. Judah Levine, head of research at Freightos, noted that tariff deadlines "may have contributed to the moderate increase in global air cargo volumes in July" (Goldstone, 2025). Industry analysts caution that while carriers are adapting by shifting capacity, longterm uncertainty tied to trade policies and tariffs could significantly impact future demand.

Source: Goldstone, C. (2025, August 15). Air freight rates hold steady, but demand growth is 'on the decline'. The Loadstar.

https://theloadstar.com/air-freight-rates-hold-steady-but-demand-growth-ison-the-decline/





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Global Market (Breakbulk

Stable Trends Continue in Multipurpose Shipping as Fleet Pressures Grow

oepfer Transport's latest monthly market review indicates the multipurpose vessel (MPV) sector has demonstrated notable resilience in the face of seasonal fluctuations. The company's Multipurpose Index (TMI) for 12,500 dwt/F-type heavy lift vessels showed only a minor adjustment at the start of August 2025, holding close to levels seen in recent months. From a fleet development perspective, Toepfer highlighted a noteworthy shift in shipyard dynamics. A recent surge in orders for container feeder vessels has constrained available building slots for MPVs, tightening supply in future delivery schedules. This trend could influence long-term fleet expansion strategies. "Owners who are aiming for deliveries in 2027

are recommended to act quickly as there are a limited number of opportunities available," according to Toepfer Transport (Kershaw, 2025). For stakeholders in project cargo and heavy lift-logistics, these conditions indicate a market that, while not experiencing dramatic rate surges, is nonetheless moving toward gradual tightening.

Source: Kershaw, D. (2025, August 7). Toepfer Transport's monthly multipurpose shipping rate update. Heavy Lift & Project Forwarding International. https://www.heavyliftpfi.com/sectors/toepfer-transportsmonthly-multipurpose-shipping-rate-update/21174.article?utm_ campaign=Friday%20Flyer%20-%20080825%20-%20PL&utm_ medium=email&utm_source=email&utm_content=newsletter



SOLUTIONS IN EVERY DIRECTION







Chilean Ports Closed Following Tsunami Alert



Source: PortalPortuario Editorial Staff. (2025, July 31). *Chilean ports remain inactive due to tsunami alert*. PortalPortuario. https://portalportuario.cl/puertos-chileno-se-mantienen-inactivos-debido-a-

hilean ports were brought to a standstill at the end of July 2025 after a tsunami alert was issued in response to an 8.8-magnitude earthquake recorded off Russia's Kamchatka Peninsula on July 30. As a result, all ports across Chile remained closed, with vessel tracking platforms showing no ships at berth and dozens idling offshore. Government officials confirmed the scope of the alert, which spanned nearly the entire Chilean coastline. During a press briefing, Interior Minister Álvaro Elizalde explained that "the state of alert remains in effect from the Arica and Parinacota Region to the Los Lagos Region" (PortalPortuario, 2025). Port schedules showed that vessels were expected to resume activity by August 1, once conditions improved. For the logistics industry, the temporary shutdown highlighted the vulnerability of port-dependent supply chains to sudden natural hazards. Cargo handling, dispatching, and inland transportation were delayed, resulting in backlogs that required rescheduling once maritime authorities gave clearance. Vessel congestion offshore further complicated recovery, as dozens of ships waited for berthing instructions.

Amazon River's Low Water Levels Prompt Carrier Surcharge in Manaus

he Amazon Basin continues to face challenging navigation conditions as seasonal river levels recede, directly impacting vessel access to Manaus. In a recent customer advisory, Hapag-Lloyd noted, "As water levels on the Amazonas River continue to decrease, we are implementing a Low Water Surcharge (LWS) to and from the Port of Manaus, Brazil" effective as early as September (Hapag, 2025).

estado-de-alerta-por-tsunami/

Source: Hapag-Lloyd. (2025, August 12). *Implementation of Low Water Surcharge to/from Manaus*. Hapag-Lloyd.

https://www.hapag-lloyd.com/en/services-inform

MA CGM has confirmed the implementation of a Low Water Surcharge (LWS) effective September 2025 for all imports and exports through the Port of Manaus. "This surcharge is necessary to address the additional operational costs arising from draft restrictions and reduced vessel capacity caused by the low water levels" (CMA-CGM,

Source: CMA-CGM. (2025, August 5). *Low Water* Surcharge in Manaus, Brazil. CMA-CGM.

https://www.cma-cgm.com/news/5156/low-watersurcharge-in-manaus-brazil?utm_source=chatgpt.



ccording to the Maersk advisory, "The 'Rio Negro' river in Manaus beganits recession period on July 9, 2025, with an accumulated decrease of 67 cm to date, which is below the historical average for this period" (Maersk, 2025). To safeguard service reliability, Maersk is implementing a Low Water Surcharge (LWC) that will be applied to shipments to and from Manaus, effective in October.

Source: Maersk. (2025, August 6). *Low Water Surcharge (LWC) – Manaus 2025*. Maersk.

https://www.maersk.com/news/articles/2025/07/







Container Shipping Rates See Sustained Decline Post Early Surge

ollowing what some in the industry have termed an "early peak," a sustained decline in container spot rates has become a notable trend. This shift is reshaping strategies for logistics professionals and businesses that rely on ocean freight. According to Drewry, "the slowing US economy and increased tariffs had prompted retailers to scale back procurement, which it said would reduce transpacific spot rate volatility" (Whiteman, 2025). The overall sentiment among market observers, however, remains cautious, with some expressing concern that the current situation may extend into the next year. The current market conditions present a unique challenge for shippers negotiating new long-term contracts. The decision-making process now involves a careful balance between the current market state and projections for future rates. The container shipping sector remains resilient, adapting to these complexities with strategic foresight.





Navigating Feeder Capacity Challenges in Asia's Supply Chain



Source: Wallis, K. (2025, August 21). *Tight Asia feeder capacity causing disruption for export, import shippers.* Journal of Commerce. https://www.joc.com/article/tight-asia-feeder-capacity-causing-disruption-for-export-import-shippers-6066813

he maritime logistics sector in Asia is facing significant disruptions due to limited feeder vessel capacity connecting secondary ports to major transshipment hubs. According to supply chain partners, "The difficulties have led to transshipment delays and rolled cargo, which have caused increased yard density at some ports that has exacerbated delays" (Wallis, 2025). Operational pressure is most visible at transshipment points such as Singapore, Shanghai, Ningbo, Qingdao, and Port Klang. Port congestion and service delays have prompted container lines to become more selective about the cargo they accept, showing preference for shipments moving on direct lanes rather than those requiring feeder connections. This situation underscores the interconnectedness of the logistics network and the importance of adapting to evolving market conditions. Supply chain managers are encouraged to plan with extended lead times and maintain clear communication with their logistics partners to mitigate potential delays.





South Korea and China race to develop **Europe trade corridors via the Arctic**

he global logistics landscape is witnessing a significant shift as nations explore alternative trade corridors to mitigate disruptions and enhance supply chain efficiency. South Korea is accelerating efforts to establish itself as a leader in Arctic shipping, positioning the Northern Sea Route (NSR) as a critical alternative for Asia-Europe trade. The Korea Ocean Business Corporation (KOBC), a state-backed ship finance institution, announced the launch of an initiative aimed at developing this passage as a stable corridor connecting Busan to Rotterdam. As the organization explained, "With the recent disruptions in the Suez Canal and Red Sea tensions, the Arctic's value as a stable alternative is growing" (Koo, 2025). At the same time, China is also exploring Arctic routes, with Nanjing's Longtan Port Terminal completing its first container voyage to Europe using this northern passage. The collective interest and investment from multiple nations signal the increasing importance of this emerging trade lane as a future cornerstone of international trade and logistics.

Source: Koo, A. (2025, August 21). South Korea rates to develop Arctic shipping, revealing plan for 'industrial cluster'. The Loadstar. https://theloadstar.com/south-korea-races-to-develop-arctic-shippingrevealing-plan-for-industrial-cluster/





Asia-Pacific Air Cargo Sees Renewed Demand to U.S.



ir cargo volumes from Asia-Pacific to the U.S. are showing early signs of recovery after months of stagnation. According to WorldACD data, China-U.S. demand rose 5% year-over-year in early August, marking the first positive growth since April. At the same time, volumes to Europe have trended down for four consecutive weeks. WorldACD noted that these "divergent trade flows indicate a possible shift as Chinese exports realign with the U.S. market amid finalized tariff arrangements" (Brett, 2025).

Source: Brett, D. (2025, August 18). *Air cargo demand from APAC to the US picks* up. Air Cargo News. https://www.aircargonews.net/data-news/air-cargodemand-from-apac-to-the-us-picks-up/1080542.article







Global Container Growth Faces Pressure from U.S. Import Swings

he container shipping industry is bracing for renewed uncertainty as fluctuations in U.S. imports present growing risks to global trade flows. Recent analysis highlights how sharp volume swings, combined with escalating trade tensions, could lead to significant losses for global container volume throughout 2025. Sea-Intelligence's recent analysis highlights how the industry is experiencing what it calls "trade whiplash," a rapid boom-and-bust cycle in imports, exacerbated by ongoing trade tensions and macroeconomic headwinds. "The analysis confirmed that the effect is already unfolding, with early 2025 seeing a surge in imports driven by front-loading ahead of potential tariffs, followed by a rapid decline" (Magli, 2025).



Source: Magli, D. (2025, August 15). *US import volatility poses risk to global TEI volumes*. Port Technology.

https://www.porttechnology.org/news/us-import-volatility-poses-risk-to-global-teu-volumes/#:~:text=Sharp%20swings%20in%20US%20import%20volumes%20and%20rising,400%2C000%20TEU%20in%202025%20if%20macroeconomic%20pressures%20persist

Expansion Underway at Port of Charleston to Boost Container Capacity and Rail Connectivity

he Port of Charleston is advancing its infrastructure to meet growing maritime demands by expanding the Hugh K. Leatherman Terminal with the addition of a second berth. According to a statement from the South Carolina Ports Authority (SC Ports), "The second berth, outfitted with five cranes, will allow the terminal to handle two super-post-Panamax vessels at once" (Angell, 2025).

In addition to the new berth, the Leatherman terminal will also enhance its intermodal capabilities with the upcoming Navy Base Intermodal Facility. This infrastructure will streamline cargo movement, benefiting industries reliant on timely deliveries.

Source: Angell, M. (2025, August 21). *Charleston's Leatherman terminal eyes second berth by late 2026.* Journal of Commerce.

https://www.joc.com/article/charlestons-leatherman-terminal-eyes-second-berth-by-late-2026-6066963



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Houston Port Expands Capacity to Meet Growing Post-Panamax Demand

ort Houston is significantly enhancing its operational capacity with a new wharf at its Bayport Terminal, a strategic move designed to accommodate the increasing number of larger post-Panamax ships. This development is part of a broader, multi-phase investment to strengthen the port's position as a key gateway for global commerce. The additional wharf will "decrease the anchor wait time for vessels, allowing for quicker turnaround time for our customers" per the Port Houston Authority (Angell, 2025). These proactive infrastructure improvements are essential to keeping pace with industry demands and reinforcing the port's role as a vital logistics hub.

Source: Angell, M. (2025, August 12). New Houston berth to enhance post-Panamax handling. Journal of Commerce. https://www.joc.com/article/new-houston-berth-to-enhance-postpanamax-handling-6062105





North America Market

Rail Freight

New BNSF-CSX Lanes Deepen West Coast to Southeast Rail Connectivity



NSF Railway and CSX Transportation are expanding their joint intermodal network with new routes connecting the U.S. West Coast to key markets in the Southeast. The pair also unveiled new international intermodal flows tying Kansas City to the Port of New York-New Jersey and the Port of Virginia. These new services are positioned as a strategic response to shifting competitive dynamics, particularly as Union Pacific and Norfolk Southern pursue federal approval for their proposed transcontinental merger. As BNSF's Jon Gabriel noted, "This collaboration between BNSF and CSX demonstrates the power of partnership, delivering greater flexibility, efficiency and value for our customers" (Ashe, 2025).

Source: Ashe, A. (2025, August 22). BNSF, CSX unveil new joint intermodal lanes in aftermath of UP-NS merger. Journal of Commerce. https://www.joc.com/article/bnsf-csx-unveil-new-joint-intermodal-lanes-inaftermath-of-up-ns-merger-6067789





Air Freight

7Air Expands Operations with Miami Cargo Launch

iami-based carrier 7Air officially inaugurated its cargo service at Miami International Airport (MIA) with a ribbon-cutting event and aircraft tour. Operating three B737-800SF freighters, and with a fourth planned by year-end, the airline now runs 20 weekly flights to Managua, Santo Domingo, and San Juan, plus charters to other Latin American markets. As the CEO of 7Air Cargo noted, 7Air's entry highlights MIA's role as the leading U.S. gateway to Latin America and the Caribbean (STAT Times, 2025).

Source: STAT Times. (2025, August 18). *7Air launches cargo service at Miami International Airport.* STAT Times.

https://www.stattimes.com/air-cargo/7air-launches-cargo-service-at-miami-international-airport-1356225



Trade Compliance Under the Spotlight as Tariffs Expand

Source: Gallagher, J. (2025, August 7). *Trade expert predicts 200% surge in tariff-fraud crackdowns.* FreightWaves.

 ${\color{blue} https://www.freightwaves.com/news/trade-expert-predicts-200-surge-intariff-fraud-crackdowns}$

ith new tariffs in effect, U.S. importers face intensified scrutiny from Customs and the Department of Justice. Trade expert Rennie Alston warned that "circumvention of tariffs in my professional opinion will be the number one revenue generating penalty" (Gallagher, 2025). Importers are urged to ensure accurate reporting of merchandise value and origin, as compliance errors may be treated as intentional. Legal advisors note that evolving practices like Modified Delivery Duty Paid could trigger severe penalties, emphasizing the need for brokers and companies to proactively manage customs compliance.



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EU ETS Ushers in New Era for Maritime Shipping

he European Union's Emissions Trading System (EU ETS) is reshaping maritime transport, marking a decisive shift from voluntary to mandatory carbon accountability. Beginning September 30, 2025, shipping companies must surrender allowances covering 40% of their reported CO₂ emissions from 2024, marking the first compliance milestone in a phased implementation. "Shipping companies are responding to the challenge by investing in energy efficiency and new technologies: installing energy-saving devices, using sustainable biofuels, modernizing hulls with low-friction paints, and incorporating vessels powered by alternative fuels" (MundoMaritimo, 2025). For logistics leaders, this evolution underscores the reality that environmental sustainability is no longer optional. Instead, it has become a central factor in operational resilience, customer engagement, and longterm competitiveness across the shipping industry.



Source: MundoMaritimo. (2025, August 25). *The EU ETS marks the end of an era by forcing shipping companies to bear the costs of their emissions.* MundoMaritimo.

https://www.mundomaritimo.cl/noticias/eu-ets-marca-el-fin-de-una-era-al-obligar-a-las-navieras-a-asumir-los-costos-por-sus-emisiones

European Port Congestion Signals Long-Term Infrastructure Strain

orth European container terminals are facing prolonged bottlenecks as capacity expansion fails to keep pace with growing demand. Persistent congestion across the region's busiest ports has delayed vessel turnarounds and reduced schedule reliability, resulting in a decline in on-time performance on the Asia–North Europe trade lane. Landside challenges are compounding the issue. Drewry's Eleanor Hadland observed that, "there needs to be a period of demand push to activate the required investments to improve the intermodal connectivity at key ports" (Knowler, 2025).

Low Rhine water levels have reduced barge capacity, while rail reliability issues are constraining alternative inland transport options. Without faster infrastructure development and more resilient intermodal links, North European ports are likely to remain under intense pressure, with lasting effects on trade flow efficiency.

Source: Knowler, G. (2025, August 12). *Underinvestment exposes European ports to systematic bottlenecks*. Journal of Commerce. https://www.joc.com/article/underinvestment-exposes-european-ports-to-systematic-bottlenecks-6062033



SOLUTIONS IN EVERY DIRECTION





Air Freight

Lufthansa Cargo Expands Global Capacity for Winter 2025/26

ufthansa Cargo announced expanded belly and freighter capacity for the upcoming winter schedule, strengthened through its cooperation with ITA Airways. With Rome-Fiumicino (FCO) now serving as a fifth hub, the carrier expects a nearly 20% increase in available capacity. Ashwin Bhat, CEO of Lufthansa Cargo, emphasized that the new schedule reflects the company's commitment to supporting trade, noting it allows the airline to provide "more connections and greater flexibility for global customers" (Jeffrey, 2025).



Source: Jeffrey, R. (2025, August 21). *Lufthansa offers more global cargo capacity for winter*. Air Cargo News. https://www.aircargonews.net/airlines/lufthansa-offers-more-global-cargo-capacity-for-winter/1080557.article

EU and UK Face Pressure to Rethink De Minimis Exemptions



uropean importers are urging policymakers to follow the U.S. in eliminating de minimis exemptions for low-value imports, particularly from China. As a head of consumer research highlights, industry experts believe such reforms are essential to "create fairer conditions for domestic retailers" (Goldstone, 2025). UK analysts warn that delaying reform until the EU's 2028 deadline could expose retailers to further surges in low-cost goods. With the U.S. already removing its exemption, the debate now focuses on how quickly Europe and the UK will act.

Source: Goldstone, C. (2025, August 20). *End de minimis rules in Europe and 'level the playing field' call*. The Loadstar. https://theloadstar.com/end-deminimis-rules-in-europe-and-level-the-playing-field-call/



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India-Mediterranean Trade Faces Ongoing Capacity Crunch Amid Blank Sailings

ndian exporters to the Mediterranean faced sustained capacity pressure as schedule disruptions and blank sailings compressed available space throughout August. Forwarders reported that westbound slots—particularly into the West Mediterranean—were constrained after multiple skipped calls, pushing shippers to recalibrate booking lead times and routings. "Space availability is said to be relatively better off for the India-East Mediterranean trade, a market that has been a target of opportunistic regional/feeder lines offering direct Red Sea sailings" (Mathew, 2025). From a supply chain planning perspective, shippers should build in longer booking lead times, diversify routings where feasible, and consider East Mediterranean gateways as alternatives when West Mediterranean berths are saturated.



Source: Mathew, B. (2025, August 6). *India-Med rates race higher as blank sailings continue to tighten capacity.* Journal of Commerce. https://www.joc.com/article/india-med-rates-race-higher-as-blank-sailings-continue-to-tighten-capacity-6058228







Ghana's Ports Face Pressure to Adapt to Green Shipping

hana's ports face mounting pressure as global shipping rules tighten ahead of 2027. The International Maritime Organization will require vessels to cut emissions by up to 30%, while a proposed carbon levy could reshape trade across West Africa. "More than half the country's electricity comes from gas-fired thermal plants, meaning shore power supplied to vessels could actually increase emissions rather than reduce them" (News Ghana, 2025). Ghana can leverage its leadership role in African maritime affairs to advocate for fair revenue recycling from carbon levies and strengthen regional influence. Early action, including pilot projects for green fuels, will be critical to keeping trade flows competitive and ensuring the nation's ports remain central to West Africa's logistics landscape.

Source: News Ghana. (2025, August 25). *Ghana Faces Maritime Crossroads as Global Shipping Rules Tighten*. News Ghana. https://www.newsghana.com.gh/ghana-faces-maritime-crossroads-as-global-shipping-rules-tight





en/?amp=1#origin=https%3A%2F%2Fwww.google.

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Shipping Industry Prepares for Brown Marmorated Stink Bug Controls



Source: Gard. (2025, August 21). *Preparing for the stink bug season*. Gard. https://gard.no/insights/preparing-for-the-stink-bug-season/

s September approaches, the logistics industry is once again preparing for the heightened biosecurity measures tied to the Brown Marmorated Stink Bug (BMSB) season across Australia and New Zealand. "While importers are responsible for ensuring cargo is treated and certified before departure from target risk countries, vessel crews must stay informed about seasonal biosecurity measures, remain alert for signs of BMSB or other exotic pests onboard, and report any suspected sightings to quarantine authorities at the destination port" (Gard, 2025). Ultimately, preparedness is key. By staying informed and compliant with seasonal biosecurity protocols, shipping and logistics operators can help safeguard agriculture, trade, and the broader supply chain from the disruptions associated with this invasive pest.

SOLUTIONS IN EVERY DIRECTION