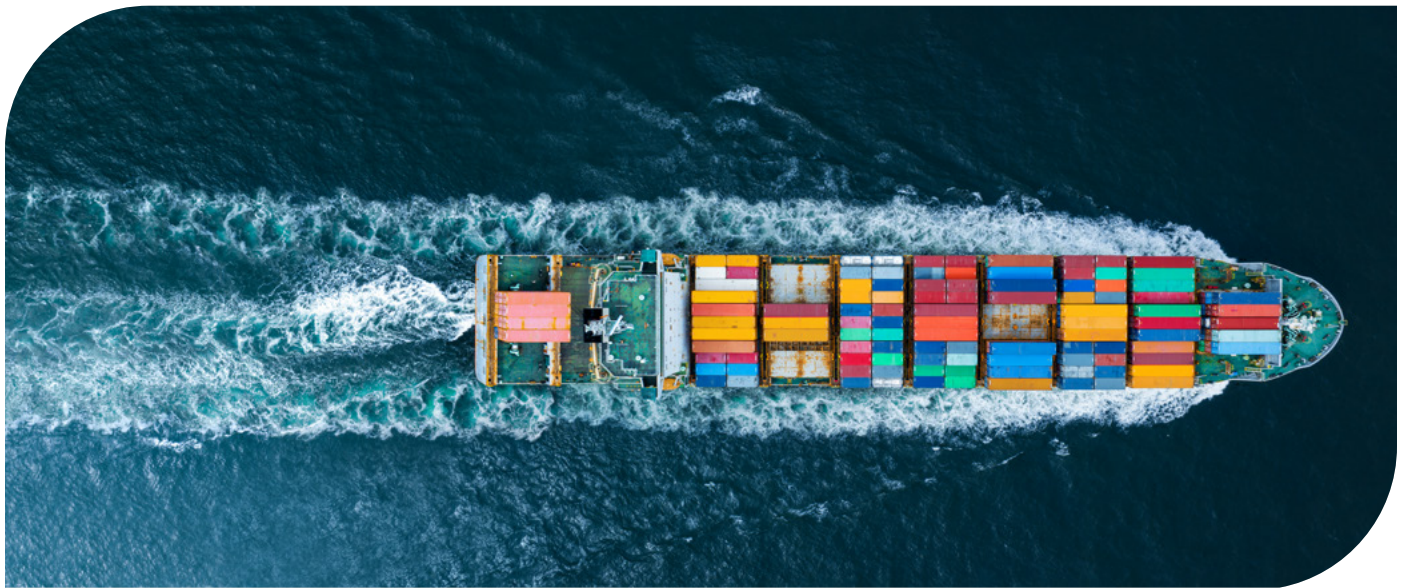


# FrachtNEWS

## Logistics Market Report

**Global Market**

Ocean Freight



## Trans-Pacific Import Decline Deepens Heading Into 2026

U.S. containerized imports from Asia are moving beyond the typical year-end lull into a more prolonged slowdown, reshaping expectations for early 2026. Normally, retailers would be winding down peak-season activity with some room to restock in the first quarter. Instead, a year of frontloaded ordering, tariff uncertainty, and more cautious household spending is pulling down volumes across the logistics chain. As S&P Global's Michael Zdinak observed, "this downshift in [retail] growth is an untimely reminder of consumers' precarious position; they have managed to continue spending despite the ebb and flow of prices in recent years, but each time their steps have been more measured" (Szakonyi, 2025). The impact is most visible on the Trans-Pacific. Laden U.S. imports peaked in July before declining from August through October, with cargo from Asia—particularly China—posting the sharpest drops.

Despite this, ocean carriers have largely maintained their service networks, relying on blank sailings and trade rebalancing rather than wholesale service withdrawals. Yet service networks remain largely intact. According to maritime intelligence provider eeSea, carriers even plan to inject additional capacity from Asia to the U.S. in December, signaling ongoing competition for market share even as volumes soften. For BCOs, forwarders, and asset providers, this environment demands disciplined forecasting, agile inventory management, and a clear strategy on contract versus spot exposure as the market navigates a slower but still expanding US economy.

**Source:** Szakonyi, M. (2025, November 20). *Slump of US imports from Asia deepening*. Journal of Commerce.  
<https://www.joc.com/article/slump-of-us-imports-from-asia-deepening-6120860>



# Moderate Global Air Cargo Growth as Trade Uncertainty Eases

**A**ir cargo demand is still expected to grow 3–4% in 2025, though momentum has cooled heading into Q4. According to van de Wouw and Zhang, early signs show that “some stability starts to return on major corridors, and everything is less hectic on a global level” (de Wouw, 2025). The slowdown follows frontloaded shipments earlier in the year and shifting trade patterns influenced by tariffs and seasonal disruptions.

Despite softer volumes in September, analysts note that overall performance in 2025 “may not be as bad as feared.”

**Source:** Van de Wouw, N., & Zhang, W. (2025, October 2). *Despite slowing trend into Q4, 2025 ‘not as bad as feared’ for airlines and forwarders as trade turmoil puts air cargo volumes on track for 3-4% growth year-on-year.* Xeneta. <https://www.xeneta.com/news/2025-not-as-bad-as-feared-for-airlines-and-forwarders-as-trade-turmoil-puts-air-cargo-volumes-on-track-for-3-4-growth-year-on-year>



# E-Commerce Demand Tightens Airfreight Space for Europe’s Perishable Shippers



**A** surge in China-Europe e-commerce traffic is tightening wide-body freighter capacity, creating challenges for perishables moving into Europe. Industry leaders report that strong demand from Asian marketplaces is pulling large freighters away from traditional routes, noting that “China-Europe e-commerce is now soaking up a lot of freighter capacity” (Todd, 2025). As a result, shippers are turning to alternative airports and smaller aircraft while prioritizing faster ground handling and cross-Channel connections to keep time-sensitive goods on schedule.

**Source:** Todd, S. (2025, November 20). *Ex-China ecommerce switch hits freighter capacity for perishables.* The Loadstar. <https://theloadstar.com/ex-china-e-commerce-switch-hits-freighter-capacity-for-perishables/>





# Multipurpose Vessel Market Holds Steady as Charter Extensions Tighten Fleet Availability



Toepfer Transport reported that multipurpose vessel activity remained consistently strong heading into November 2025, reflecting a sector that continues to operate with limited vessel availability and sustained charterer demand. As a key indicator of global project-cargo dynamics, Toepfer's analysis highlights a market holding its ground even as trade route patterns evolve. While the ultimate impact on routing decisions remains to be seen, Toepfer notes that this policy shift introduces new dynamics that could reshape regional cargo flows. The firm stated, "With the US port call fees and tariffs being suspended we shall see how things will unfold and if and how trade routes and the multipurpose market will be influenced" (Kershaw, 2025).

**Source:** Kershaw, D. (2025, November 5). Toepfer Transport's monthly multipurpose shipping rate update. Heavy Lift & Project Forwarding International.

<https://www.heavyliftpf.com/sectors/toepfer-transports-monthly-multipurpose-shipping-rate-update/21174.article?adredir=1>

# Rising Carrier Sentiment Offers a Cautious Glimpse of Stability for the MPP Sector

Confidence in the multipurpose (MPP) and breakbulk shipping sector showed its first meaningful improvement of 2025, according to the latest Market Sentiment Index (MSI) from One World Shipbrokers. After a subdued summer marked by hesitation across project logistics, the September reading reflected a subtle but notable shift toward renewed optimism. The report emphasizes that U.S. policy dynamics remain a crucial variable shaping market outlook. As the MSI states, "Regulatory shifts and uncertainty in the United States remain the dominant concern" (Bajic, 2025). Carriers continue to delay investment decisions as they navigate shifting compliance expectations and an evolving geopolitical backdrop. For now, the MPP segment appears positioned in a phase of cautious recalibration, balancing expanding long-term project opportunities with a still-uncertain global landscape.

**Source:** Bajic, A. (2025, October 27). MPP carrier confidence edges up as uncertainty clouds outlook. Project Cargo Journal.  
<https://www.projectcargojournal.com/transport-installation/2025/10/27/>





Asian Market

Ocean Freight



## Asian Export Routes to the US See Sharp Rate Declines

Trans-Pacific ocean carriers are facing renewed pricing pressure as November progresses, with container rates on key Asia-US routes sliding after a brief period of stabilization. Data from ICIS and Freightos shows that West Coast rates moved lower this week, underscoring the influence of seasonal demand patterns and additional vessel deployments. Judah Levine, head of research at Freightos, noted that the market's earlier momentum has reversed, explaining that "since October, container carriers have been contending with downward pressure on rates from both the seasonal lull in demand and growing capacity on the major East-West trades" (Indexbox, 2025). He added that recent gains introduced through mid-October and early November adjustments have now largely faded as daily pricing trends weaken. As planning for December unfolds, carriers must balance capacity discipline with rapidly changing demand signals, suggesting that Trans-Pacific volatility may continue into the early weeks of 2026.



**Source:** Indexbox. (2025, November 23). *Asia-US Transpacific Container Rates Slide in November 2025*. Indexbox. <https://www.indexbox.io/blog/asia-us-transpacific-container-rates-slide-in-november-2025/>

## China's Exhibition Platforms Strengthen Global Engagement and Consumer



**Source:** Huaxia. (2025, November 16). *Exhibition economy helps China expand opening-up, boost consumption*. Xinhua. <https://english.news.cn/20251116/9b67270fb25249c797e001646940e23f/>

China's expanding exhibition economy is reinforcing the country's long-term strategy to deepen global engagement and stimulate domestic consumption. Two of its largest annual trade showcases—the 138th Canton Fair in Guangzhou and the eighth China International Import Expo (CIIE) in Shanghai—closed November events with record-setting participation and a renewed emphasis on collaboration across global supply chains. As Xinhua reported, the two events demonstrated "the country's firm commitment and strong momentum to open its market further and boost consumption" (Xinhua, 2025). The Canton Fair marked a new level of global engagement. International buyers showed heightened interest in China's manufacturing capabilities, supply-chain breadth, and emerging technologies. Momentum carried into the CIIE in Shanghai, which expanded its exhibitor base and showcased new products across biomedicine, advanced equipment, and low-carbon technology. For companies across marketing, logistics, and international trade, both events offer expanding touchpoints to assess market conditions, explore innovation, and strengthen cross-border commercial networks.





## Asian Market

Air Freight

## Silk Way West Finalizes Four-Aircraft A350F Fleet Upgrade

Silk Way West has exercised options for two additional A350F freighters, completing its planned four-aircraft commitment as part of a broader fleet modernization strategy. The airline said the decision marks “a major milestone in our company’s growth and reflects our confidence in the future of sustainable air freight” (Brett, 2025). With the A350F joining pending 777Fs and 777-8Fs, the carrier is preparing to retire older 747-400Fs and reinforce its position along the Silk Road. Airbus noted that the aircraft will support Azerbaijan’s role as a growing global cargo hub.

**Source:** Brett, D. (2025, November 19). *Silk Way West adds to its order for A350 freighters*. Air Cargo News.

<https://www.aircargonews.net/freighter-operators/silk-way-west-adds-to-its-order-for-a350-freighters/1080928.article>



## Latin American Market

Ocean Freight



## EU–Mercosur Deal Faces Final Challenges as Deadline Nears



**Source:** bnl Sao Paulo bureau. (2025, November 21). *EU-Mercosur trade pact faces dual threat from Paris and internal rifts*. Bne Intellinews.

<https://www.intellinews.com/eu-mercator-trade-pact-faces-dual-threat-from-paris-and-internal-rifts-412711/>

As negotiations around the long-anticipated EU–Mercosur trade agreement enter their final stretch, both internal dynamics within Mercosur and firm resistance from parts of the European Union are shaping a complex endgame. European hesitation remains strong, particularly from France and Poland, where leaders say they are awaiting clearer commitments on agricultural safeguards and environmental oversight. “Beyond EU negotiations, Mercosur faces internal strains,” with Brazil’s position creating tension with Uruguay and Paraguay (bnl Sao Paulo bureau, 2025). As geopolitical competition intensifies and global supply chains diversify, supporters argue the agreement presents an opportunity for Europe and South America to anchor long-term commercial ties. Whether consensus can be reached in the coming weeks will determine the trajectory of one of the most significant interregional trade initiatives in decades.

## Latin American Market

## Ocean Freight

## ANTAQ Removes Low-Water Fee as Amazon River Conditions Improve

In late October, Brazil's National Agency for Waterway Transportation (ANTAQ) moved to suspend the Low Water Surcharge—often referred to as the “dry surcharge”—for maritime container movements to and from Manaus. ANTAQ determined that “the measure, adopted last year, was no longer necessary, since this year the hydrological scenario in the region was not one of severe drought” (Essay, 2025). The agency also outlined new criteria for any future reactivation of the surcharge. Moving forward, application of the fee will only be permitted if water levels on the Rio Negro fall to 17.7 meters or below before the end of 2026 and the need for the charge is technically demonstrated. For shippers, manufacturers, and retailers dependent on Manaus's supply chains, the suspension offers immediate relief.

**Source:** Essay. (2025, October 30). *ANTAQ suspends collection of the “dry tax” for container transport in Manaus (AM)*. Informativo Dos Portos.

<https://www.informativodosportos.com.br/antaq-suspende-cobranca-da-taxa-de-seca-para-o-transporte-de-containers-em-manaus-am/>



## Panama Canal Reservoirs Approach Capacity as Authorities Prepare Controlled Water Releases



According to a report by the Panama Canal Authority, “Lakes Gatun and Alhajuela, which comprise the main freshwater reserves of the water system that supplies and enables the operation of the interoceanic waterway, are nearing their maximum operating levels” (MundoMaritimo, 2025). These lakes are central to the canal's daily operations. They provide the freshwater required to lift ships roughly 26 meters above sea level through the lock system, with each vessel passage demanding significant water volumes. This latest advisory arrives after the significant 2023–2024 drought, which constrained vessel traffic and forced global shippers to divert cargo to alternate routes. Although rainfall and conservation strategies improved conditions throughout 2025, the Panama Canal Authority continues to monitor climate-related variability closely.

**Source:** MundoMaritimo. (2025, November 21). *Lakes that supply the Panama Canal are nearing their maximum levels*. MundoMaritimo.

<https://www.mundomaritimo.cl/noticias/lagos-que-abastecen-al-canal-de-panama-se-acercan-a-sus-niveles-maximos>



## Latin American Market

## Ocean Freight

## Foreign Investment Strengthens Paranaguá's Role in Brazil's Maritime Future

Brazil's Port of Paranaguá is set to gain new momentum as international investment accelerates long-term development and capacity enhancements at one of the nation's most strategically important gateways. A new agreement between the Ministry of Ports and Airports (MPor) and China Merchants Port (CMPort) underscores how foreign capital continues to recognize Brazil's rising role in global trade flows. "The modernization of Brazilian ports, which are the gateway for both entry and exit of foreign trade, is a determining factor in reducing the "Brazil Cost" and promoting economic growth" (BE News, 2025). With upgraded equipment, expanded capacity, and improved operational resilience, Paranaguá is poised to meet rising demand and contribute meaningfully to the nation's economic growth trajectory.

**Source:** BE News, (2025, November 21). *International investment in Paranaguá*. BE News. <https://portalbenews.com.br/opinioao/investimento-internacional-em-paranagua/>



## Latin America–Caribbean Trade Outlook Strengthens Despite U.S. Tariff Environment



**Source:** Cambero, F. (2025, November 19). *Trade between Latin America and the Caribbean due to grow in 2025 despite US tariff policy, ECLAC report shows*. Reuters. [https://www.reuters.com/world/americas/trade-between-latin-america-caribbean-due-grow-2025-despite-us-tariff-policy-2025-11-19/?utm\\_source=chatgpt.com](https://www.reuters.com/world/americas/trade-between-latin-america-caribbean-due-grow-2025-despite-us-tariff-policy-2025-11-19/?utm_source=chatgpt.com)

Trade flows across Latin America and the Caribbean are positioned for continued expansion in 2025, supported by resilient demand and stronger-than-expected global commerce, according to a new assessment from the UN Economic Commission for Latin America and the Caribbean (ECLAC). The agency's latest report indicates that regional performance has outpaced initial fears surrounding broad U.S. tariff actions. The reports notes that "The impact of these tariff increases on the dynamism of global trade has been less than initially expected, largely due to the acceleration of imports and the accumulation of inventories by U.S. companies during the first quarter and the strong momentum of trade between Asian economies" (Cambero, 2025). However, the organization cautioned that conditions may shift in 2026 as global demand softens. In light of this, the report encourages governments and private-sector leaders to deepen regional integration and diversify trade relationships to strengthen long-term resilience.

## North America Market

Air Freight



## U.S. Airspace Returns to Standard Operations

As the U.S. air-cargo sector is moving back to predictable skies after the Federal Aviation Administration (FAA) lifted its flight-reduction emergency order. The agency attributed the decision to improving post-shutdown staffing levels, noting that the move “reflects the steady decline in staffing concerns across the NAS and allows us to return to normal operations” (Jeffrey, 2025). This shift restores flexibility for airlines and reduces pressure on logistics networks previously affected by widespread cancellations. As operations normalize, industry partners can expect more reliable scheduling and fewer operational constraints.



**Source:** Jeffrey, R (2025). Federal Aviation Administration lifts restrictions as staffing triggers drop from record 81 to single digits, ending disruption from shutdown. Air Cargo News. <https://www.aircargonews.net/airlines/normal-us-flight-operations-resume-after-end-of-faa-emergency-order/1080935.article>

## Louisville Reopens All Runways as Cargo Operations Stabilize

Louisville Muhammad Ali International Airport has fully restored runway access after the fatal MD-11 freighter accident. Airport director Dan Mann noted that “all three runways at SDF are now available for use and the airfield is fully operational to aircraft” (Brett, 2025) emphasizing both recovery and community support. Investigators continue analyzing flight data and turbofan debris, while UPS gradually resumes activity at its Worldport hub.

As one of the world’s top cargo airports, SDF’s rapid return to service is essential for maintaining global freight flow.

**Source:** Brett, D. (2025, November 7). Louisville runways fully operational following freighter tragedy. Air Cargo News. <https://www.aircargonews.net/cargo-airports/louisville-runways-fully-operational-following-freighter-tragedy/1080876.article>





## North America Market

Breakbulk

# Foreign Trade Zone Growth Accelerates Across US Ports

As US importers seek greater operational flexibility amid ongoing trade uncertainty, port authorities nationwide are expanding foreign trade zone (FTZ) designations and bonded warehousing footprints to keep breakbulk and project cargo moving while preserving flexibility for cargo owners. “FTZs give importers of breakbulk and project cargo advantages such as duty deferral, flexible storage options and streamlined customs clearances” (Giusti, 2025). A foreign trade zone is a federally designated site treated as being outside US Customs authority until freight formally enters domestic commerce. This structure allows cargo to remain in storage indefinitely and offers duty deferral until goods leave the zone. As FTZ activity grows, US ports are positioning themselves to provide the capacity, warehousing, and administrative support needed to serve increasingly complex breakbulk supply chains.

**Source:** Giusti, A. (2025, November 21). *US ports seek to expand FTZs for breakbulk cargo*. Journal of Commerce. <https://www.joc.com/article/us-ports-seek-to-expand-ftzs-for-breakbulk-cargo-6121418>



## North America Market

Rail Freight

# New UP Strategy Optimizes West Coast Connections to Cincinnati



**Source:** Ashe, A. (2025, November 21). *UP enhances intermodal between LA and Cincinnati*. Journal of Commerce. <https://www.joc.com/article/up-enhances-intermodal-between-la-and-cincinnati-6121497>

Union Pacific (UP) has introduced a revised routing strategy designed to create a more efficient intermodal connection between Southern California and Cincinnati—an adjustment that reinforces its alignment with the region’s warehousing hubs and evolving inland demand patterns. “Effective Nov. 20, domestic containers destined for Cincinnati must originate at UP’s City of Industry or Inland Empire terminals rather than its Los Angeles Transportation Center in eastern Los Angeles” (Ashe, 2025). While the shift supports a more efficient start to the journey, the mid-continent interchange in Chicago grows more complex. Under the revised plan, containers transferring from UP to NS in the Chicago market must now be trucked between terminals. As intermodal networks continue to adapt to shifting freight flows, shippers will be watching how these changes influence consistency, velocity, and end-to-end service reliability in the LA–Cincinnati corridor.



## North America Market

Trucking

## Mexico's Nationwide Highway Blockades Create Significant Disruptions for Cross-Border Freight

Major freight corridors across Mexico experienced severe interruptions as coordinated protests by truckers and agricultural groups triggered widespread highway blockades. The mobilization was led by several organizations, including the National Autonomous Alliance of Transporters (ANTAC), the National Front for the Rescue of the Countryside, and the Movimiento Agrícola Campesino. Their actions stalled traffic on key arteries such as Mexico City–Toluca, Mexico City–Puebla, and Mexico City–Querétaro, while additional slowdowns were reported throughout Chihuahua, Zacatecas, Sinaloa, San Luis Potosí, and the State of Mexico. “Truckers say they are protesting increasing highway violence, including cargo theft, robberies and police extortion” (Mahoney, 2025). Farmer groups, meanwhile, voiced concerns about crop support mechanisms and ongoing debate surrounding reforms to Mexico’s National Water Law.



**Source:** Mahoney, N. (2025, November 24). *Widespread blockades snarl highways across Mexico, threatening freight flows*. FreightWaves. <https://www.freightwaves.com/news/widespread-blockades-snarl-highways-across-mexico-threatening-freight-flows>



## European Market

Ocean Freight



## Transatlantic Westbound Shipping Faces a Steep Utilization Decline



**Source:** Murphy, A. (2025, November 10). *Sea-Intelligence (Nov 7th, 2025) – Transatlantic is poised for a crash*. Maritime Standard. <https://www.maritimestandard.net/post/sea-intelligence-nov-7th-2025-transatlantic-is-poised-for-a-crash>

Sea-Intelligence’s latest analysis signals mounting strain across the Transatlantic Westbound trade lane as structural imbalances deepen. The organization notes that demand growth turned negative year-over-year in September, reflecting a cooling market after several years of volatility. As Alan Murphy, CEO of Sea-Intelligence, explained, “vessel utilization is projected to ‘crash’ to historically low levels, dropping well below the 2018–2019 pre-pandemic normal” (Murphy, 2025). For beneficial cargo owners and logistics planners on the Transatlantic Westbound lane, the coming months will require heightened visibility, contingency routing options, and proactive coordination with partners as carriers fine-tune network planning. The report underscores the importance of maintaining flexible booking strategies and monitoring service updates closely.



## European Market

## Ocean Freight

# Carriers Push Another December Adjustment as Asia–Europe Capacity Tightens



Ocean carriers serving the Asia–Europe and Asia–Mediterranean corridors are entering December with another round of upward pricing measures. While this new increase marks yet another step in the biweekly adjustment pattern seen over the past two months, the move reflects a broader strategic effort to balance volumes and preserve market traction during the height of tendering season. Judah Levine of Freightos highlighted that, “Asia–Europe and Mediterranean rates are holding steady, supported by aggressive blank sailings during tender season,” adding that the stability reflects broader efforts by carriers to maintain structure on lanes experiencing heavy contract renegotiations (Knowler, 2025). The key uncertainty ahead is whether demand will match the growing vessel supply.

**Source:** Knowler, G. (2025, November 19). *Asia–Europe carriers to levy yet another rate hike on Dec. 1*. Journal of Commerce. <https://www.joc.com/article/asia-europe-carriers-to-levy-yet-another-rate-hike-on-dec-1-6120158>

## Thessaloniki Expansion Positions Northern Greece as a Strategic Mediterranean Gateway

The Port of Thessaloniki has taken a significant step toward redefining its position within the Mediterranean and Southeast Europe, launching a long-anticipated expansion that aims to transform the facility into a major regional gateway. “Port officials are calling the new project “the most important upgrade project in the history of the Port of Thessaloniki” (The Maritime Executive, 2025). Under a newly finalized concession agreement with the Hellenic Republic, the port authority will implement a series of infrastructure enhancements centered on Pier 6, its primary container berth. As capacity increases and infrastructure upgrades take shape, supply chain planners will likely evaluate Thessaloniki as part of broader network optimization strategies, especially amid shifting trade patterns and evolving geopolitical considerations.

**Source:** The Maritime Executive. (2025, November 21). *Thessaloniki Port Expansion Begins as US Calls for Alternatives to COSCO*. The Maritime Executive. <https://maritime-executive.com/article/thessaloniki-port-expansion-begins-as-us-calls-for-alternatives-to-cosco>



## European Market

## Air Freight

## Lufthansa Cargo Broadens Global Reach Through ITA Partnership



Lufthansa Cargo has expanded its capacity cooperation with ITA Airways, adding new global routing options as Fiumicino becomes the Group's fifth European hub. With most routes now integrated under Lufthansa Cargo's AWB 020, the carrier says the collaboration marks "an important milestone in the expansion of our global network for our customers" (Jeffrey, 2025). The enhanced partnership offers additional connections across South America, Asia, North Africa, and the Middle East, strengthening flexibility for shippers and supporting broader intercontinental flows while regulatory approval for U.S. and Canada routes remains pending.

**Source:** Jeffrey, R. (2025, November 17). Lufthansa Cargo expands capacity agreement with ITA. Air Cargo News.

<https://www.aircargonews.net/airlines/lufthansa-cargo-expands-capacity-agreement-with-ita/1080911.article>

## A340 Fleet Positioned to Power BlueLight's Global Aid Missions

BlueLight Humanitarian Airlines, based in Geneva, is launching a nonprofit carrier dedicated to rapid response aid delivery using converted Airbus A340-300s. As the founders explain, the aircraft will support "passenger transport for humanitarian staff, a fully-equipped flying hospital, and significant cargo capacity" (Lennane, 2025). The model enables fast, neutral access to crisis zones while operating under a transparent fixed-cost structure.

BlueLight aims to strengthen global relief logistics by combining long-range capability with mission-driven operations.

**Source:** Lennane, A. (2025, November 18). New humanitarian carrier BlueLight bets on A340s for aid missions. The Loadstar.

<https://theloadstar.com/new-humanitarian-carrier-bluelight-bets-on-a340s-for-aid-missions/>





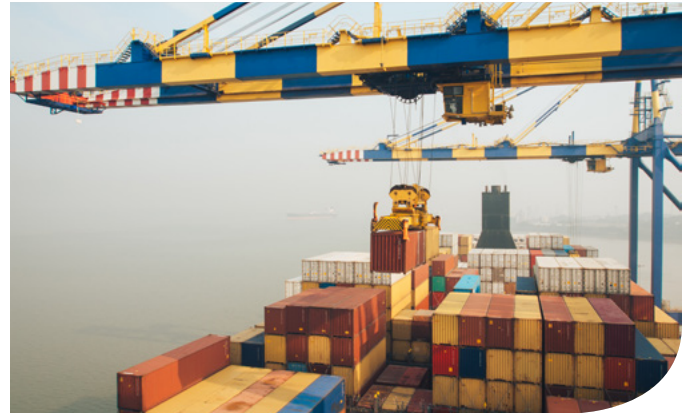
## India Market

## Ocean Freight



## Carriers Expand India-Focused Networks to Capture Regional Trade Momentum

Major ocean carriers are directing more resources toward India-centric regional routes as shifting demand patterns and tariff-driven uncertainty reshape global trade. This strategic realignment reflects a broader effort to reinforce schedule reliability, strengthen Gulf and Red Sea connectivity, and provide shippers with alternative corridors that better support regionalized supply chains. Much of the recent momentum stems from expanding production activity across southern India, “primarily catering to the needs of industrial clusters that have sprung up in and around the Chennai region, powered by so-called trade diversification” (Mathais, 2025). As carriers continue to rebalance vessel deployment and strengthen regional port-pairing strategies, India’s position as a hub for intra-Asia and Gulf trade is becoming increasingly significant, offering operators new opportunities to stabilize volumes and serve emerging customer needs.



**Source:** Mathais, A. (2025, November 20). *Major ocean carriers tap into the growing India-centric regional trade.* The Loadstar.

<https://theloadstar.com/major-ocean-carriers-tap-into-the-growing-india-centric-regional-trade/>

## Middle East Market

## Ocean Freight

## Egypt’s Expanding Port Capacity Reshapes East Mediterranean Transshipment Strategies



Egypt’s ongoing port development is reshaping the competitive dynamic across the East Mediterranean, offering carriers new flexibility as regional transshipment hubs evolve and operators anticipate the eventual restoration of Suez Canal transits. The newest milestone came with the expansion of APM Terminals’ Suez Canal Container Terminal (SCCT). Should Suez transits resume in the coming year, the additional capacity may become a strategic advantage. “The new capacity at Damietta could find itself with urgent demand if Europe’s Mediterranean ports find themselves swamped with boxes” (van Marle, 2025). With multiple high-performance hubs clustered along the country’s northern coast, Egypt’s expanded port infrastructure could help absorb a sudden resurgence of east-west flows and restore fluidity across the Mediterranean.

**Source:** van Marle, G. (2025, November 18). *Egypt port expansions may offer east Med reprieve should Canal transits resume.* The Loadstar.

<https://theloadstar.com/egypt-port-expansions-may-offer-east-med-reprieve-should-canal-transits-resume/>

## African Market

### Ocean Freight



# Ghana's Tema Port Expansion Unlocks Enhanced Capacity for West African Trade



In a major infrastructure milestone for West Africa's maritime sector, "Ghana's President has officially inaugurated Phases I and II of the Tema Port Expansion Project at Meridian Port Services' Terminal 3, marking the full completion of one of the country's most significant maritime infrastructure developments" (Nikolakis, 2025). This development marks a pivotal moment for the country's trade and supply-chain positioning by addressing several critical elements: increased throughput capacity, improved berth availability, and enhanced operational efficiency. While added capacity on its own does not guarantee higher volumes, the timing of this expansion aligns with evolving trade flows and shifting manufacturing bases in Africa.

**Source:** Nikolakis, G. (2025, November 21). *Ghana inaugurates completed expansion phases at Tema Port*. Container News. <https://container-news.com/ghana-inaugurates-completed-expansion-phases-at-tema-port/>

## African Market

### Rail Freight

# KZN Advances Inland Freight Vision with Launch of Insimbi Ridge Logistics Precinct

The KwaZulu-Natal (KZN) region is entering a new phase of freight modernization with the recent launch of the Insimbi Ridge Catalytic Project, a major inland logistics initiative designed to enhance trade efficiency, stimulate investment, and broaden employment opportunities across the province. During the launch, speakers emphasized the broader economic and operational significance of the precinct. One participant highlighted the importance of modernizing South Africa's interior freight network, explaining that the project "shows how strategic inland sites can be transformed into high-impact logistics platforms that meet the needs of a rapidly changing supply chain environment" (Logistics Update Africa, 2025). This reinforces the province's objective to position Cato Ridge as a key inland gateway.

**Source:** Logistics Update Africa. (2025, November 13). *Insimbi Ridge launch marks new phase in KZN's logistics growth*. Logistics Update Africa. <https://www.logupdateafrica.com/railways/insimbi-ridge-launch-marks-new-phase-in-kzns-logistics-growth-1357116>





# Regional Energy Expansion Highlights Opportunities and Growing Pressures Across Middle East and Africa

As global energy markets evolve, project logistics stakeholders across the Middle East and Africa are weighing both the benefits of accelerated investment and the operational hurdles that accompany it. “Global decarbonization trends are accelerating interest in hydrogen for synthetic fuels and low-carbon applications, but geopolitical tensions and shipping disruptions pose risks to this growth” (West, 2025). As regional markets diversify energy portfolios and expand upstream commitments, service providers will need to navigate variable permitting environments, limited project readiness in emerging hydrogen markets, and shifting timelines driven by geopolitical and supply-chain dynamics. For logistics and project cargo professionals, the combined shifts in energy mix, investment pacing, and regional capability development reinforce the importance of forecasting, equipment availability, and route competitiveness—particularly as stakeholders navigate evolving expectations for operational efficiency and environmental performance.

**Source:** West, S. (2025, November 13). *Al Faris, Deugro, Bahri and DSV share insights on key challenges facing region.* Breakbulk Events & Media. <https://breakbulk.com/articles/global-outlook-2025-middle-east-and-africa>

