



GLOBAL APERTURE

New data from market analysts WorldACD Market Data shows global air cargo tonnages rose 2% week over week from September 14-20— [8% higher than the same period last year](#), with Asia Pacific leading year-over-year growth at 11%. Demand is being supported by the approach of China's National Day Golden Week, while capacity increased 4% year over year, although some Middle East lanes remain below pre-conflict levels.

Container vessel capacity [is expected to outpace demand](#) in 2027 as new ships enter the fleet and carriers gradually resume Suez Canal-Red Sea routes, according to the Baltic and International Maritime Council (BIMCO). BIMCO forecasts container vessel capacity to grow 9% in 2027, while the normalization of routes could further reduce vessel demand, increasing the risk of excess capacity across the market.

Global container shipping schedule reliability [fell to 29% in August](#), down from 33% in July, while average vessel delays increased to 5.1 days, according to market analytics firm Xeneta. Far East-Europe reliability dropped to just 6%, with congestion, weather disruptions and diverted routings expected to create downstream delays in North America as shippers approach the fourth quarter and China's September-October holidays.

Following improved rainfall and water-saving measures, the Panama Canal Authority [increased the maximum authorized draft](#) for larger and more modern Neopanamax vessels to 49 feet effective September 28. Daily Neopanamax transits will also increase from nine to 10 beginning October 15, bringing total canal capacity to 33 vessels per day, although the watershed remains in a water deficit.

REGIONAL FOCUS – AMERICAS

Mexico: Hurricane Polo [disrupted maritime operations](#) along Mexico's Pacific coast on September 23, with authorities closing Acapulco and Zihuatanejo to vessels and restricting smaller vessels at several other ports. Manzanillo, Mexico's largest container gateway, remained open to large commercial vessels, allowing container traffic to continue despite high winds, heavy rainfall and dangerous waves.

Mexico's federal government has proposed [a 10% increase in air navigation fees](#) for airlines operating in Mexican airspace as part of its 2027 Economic Package. The proposal is intended to support air traffic control infrastructure, communications systems, radar networks and workforce needs as flight volumes and airport-system changes continue, though industry experts have questioned whether the additional revenue will translate into service improvements.

REGIONAL FOCUS – ASIA-PACIFIC

China: According to China's Ministry of Transport, Chinese ports [handled a record 7.3 million containers](#) in the week through September 20, up 9% from the same period last year, as export and import volumes remain elevated. Strong U.S. import activity, congestion following typhoons and shipments moving ahead of China's upcoming Mid-Autumn Festival and Golden Week holidays could keep pressure on port operations and vessel capacity in the near term.

Air cargo e-commerce exports from China [fell 16% year over year](#) by weight in August, according to consultant Aevean, as new low-value package charges continued to affect demand. Shipments from China to Europe fell 40%, while volumes to Asia Pacific declined 8% and North America remained roughly flat, indicating continued shifts in e-commerce air cargo flows.

Bangladesh: Chattogram port workers [began protests on September 22](#) over the proposed lease of the New Mooring Container Terminal to private United Arab Emirates-based operator DP World. The terminal handles nearly half of Chattogram's container volume, and workers are calling for greater transparency and national dialogue, with a day-long sit-in planned for October 5 that could disrupt port operations. A sit-in demonstration is scheduled for October 5 and union leaders from the Bangladesh Federation of Trade Unions (BFTUC) [have warned that they will escalate](#) with mass demonstrations, blockades, and work stoppages if their concerns are not addressed.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

European Union: Under European Union Directive 2024/825, [new rules targeting misleading environmental claims](#) entered into force September 27, requiring businesses to substantiate claims such as "green," "sustainable" and "eco-friendly" with evidence. The rules apply across

all 27 EU member states and can affect businesses serving customers in the EU, with non-compliant companies facing penalties including fines of up to 4% of annual turnover.

Germany: After rejecting the latest contract proposal from the Central Association of German Seaport Operators (ZDS), port workers have moved to vote on [whether to authorize an indefinite strike](#), with the vote running through October 1. If at least 75% approve the strike, it could affect operations at Hamburg, Bremen/Bremerhaven, Emden, Brake and Wilhelmshaven, adding potential delays to already pressured port operations.

Netherlands: Amsterdam Airport Schiphol handled 127,387 metric tons of air cargo in August, [an 8% increase year over year](#), according to the airport's latest cargo figures. Outbound volumes grew 14%, led by stronger shipments to North America, Africa, and Middle and South America, while total cargo volumes were up 10% year to date.