



GLOBAL APERTURE

The Iran conflict is [reshaping global supply chains](#) as disruptions in the Strait of Hormuz drive rerouting, higher fuel costs, and tightening capacity across ocean, air, and inland transport networks. As of March 24, delays, stranded cargo, and extended transit times are increasing logistics costs—potentially exceeding 30 percent—while forcing companies to adjust routing strategies and inventory planning.

Port congestion has become widespread amid this disruption with [over 80 percent of global ports](#) experiencing critical or severe conditions. Vessel delays, suspended services, and rerouted cargo are reducing schedule reliability and slowing container flow, creating cascading delays across global supply chains and manufacturing timelines.

Container shipping conditions are also tightening as these disruptions [drive higher fuel costs and impact carrier operations](#). Rising bunker fuel constraints are prompting operational adjustments such as alternative refueling and slower vessel speeds, contributing to broader supply chain inefficiencies and upward pressure across key trade lanes.

REGIONAL FOCUS – AMERICAS

United States: A dispute over container appointment booking systems at West Coast ports [is raising concerns](#) about declining supply chain efficiency. Restrictions on third-party access to terminal systems are creating operational challenges for truckers, increasing administrative burden, and risking delays in container pickup and return across key gateways. The issue is prompting calls for regulatory intervention, as industry groups warn that limited system access could hinder coordination, reduce visibility, and disrupt the smooth flow of cargo.

The suspension of the de minimis exemption for shipments under \$800 (effective since August 29, 2025) continues to reshape air freight across the Americas as it [sharply reduces cross-border e-commerce volumes](#). Air freight shipments on key China–United States lanes have declined by over 50 percent year-on-year, forcing carriers and logistics hubs to adjust capacity, reroute networks, and rethink operating models amid shifting demand patterns.

REGIONAL FOCUS – ASIA-PACIFIC

A jet fuel shortage linked to Middle East disruptions is forcing airlines in the Philippines and Vietnam to [reduce flight frequencies and suspend select routes](#), tightening regional air cargo capacity. Carriers are also adjusting fueling strategies and limiting operations on long-haul routes, creating scheduling instability and potential delays across airfreight networks.

China: A dispute over control of key Panama Canal terminals is beginning to impact global shipping, as inspections and [detentions of Panama-flagged vessels increase](#) at Chinese ports. The U.S. Federal Maritime Commission warned that these actions are causing delays and uncertainty for carriers, raising concerns over potential disruption to trade flows through one of the world’s most critical maritime corridors.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Middle East: Gulf airlines [are stabilizing operations](#) following early March airspace disruptions, with carriers adjusting networks to maintain consistent flight volumes under ongoing restrictions. While capacity remains below normal levels, continued rerouting and limited access to affected corridors are constraining airfreight flows and extending transit times across the region.

United Arab Emirates / Saudi Arabia: The Saudi Ports Authority (Mawani) and Gulftainer [launched a new trade bridge](#) connecting Sharjah and Dammam, integrating land and sea networks to accelerate cross-border cargo movement. The corridor is expected to reduce transit times, improve reliability, and strengthen regional supply chain connectivity across Gulf markets.