

APERTURE & FOCUS

WEEK 10 | 6 MARCH 2025



GLOBAL APERTURE

Ecommerce-driven [air cargo flows are shifting](#), according to industry reports, with emerging markets in the Gulf, India, Vietnam, and Europe becoming more prominent, while the US is expected to become less central. Challenges also remain, including potential changes to the EU's de minimis exemption and supply chain disruptions.

Bottlenecks at Asian and European ports, along with Red Sea diversions, are [delaying nearly 10% of all container shipping capacity](#). According to shipping industry research firm Linerlytica, port congestion—especially with long container dwell times in key ports like Shanghai, Ningbo, and Singapore—is expected to persist. This will continue to cause delays across important feeder sectors.

REGIONAL FOCUS - AMERICAS

United States: US tariffs of 25% on [imports](#) from Canada and Mexico, and 20% on Chinese goods, took effect on March 4th, 2025, prompting retaliatory actions from all three countries. Experts warn that these tariffs could lead to increased prices for US consumers, and cause supply chain disruptions affecting manufacturers further down the supply chain. In response, Mexican President Claudia Sheinbaum announced Tuesday that her government will impose [retaliatory](#) tariffs and other measures starting Sunday, while Canadian Prime Minister Justin Trudeau imposed immediate tariffs on \$30 billion worth of U.S. goods and pledged additional levies on \$125 billion in imports over the next three weeks. For more information, please refer to [KWE's recent Customer Advisory](#).

After discussions with executives from General Motors, Ford, and Stellantis, the Trump administration announced [a one-month pause](#) on tariffs specifically affecting automakers, citing concerns over supply chain stability. The decision, which comes just a day after the blanket tariff announcement, is intended to give car manufacturers time to adjust while trade negotiations continue.

The uncertainty amid all of this has led the US Air forwarders Association (AFA) [to express their concern](#) over the consequences, with 62% of members worried about the impact on their operations. The organization called for more stability and time for supply chains to adapt, warning that rapid tariff changes, like the 25% Colombian tariff threat, could harm the logistics sector and US economy.

In a major [deal](#) purportedly influenced by U.S. President Donald Trump's concerns over the Panama Canal, a U.S. consortium led by BlackRock and MSC has agreed to purchase Hong Kong-based Hutchison Port Holdings' non-Chinese assets, including the crucial Panama Canal terminals at Balboa and Cristobal. This \$22.8 billion deal, which also includes 43 ports in 23 countries, would grant the consortium majority control and comes amid growing political pressure regarding the canal's ownership.

REGIONAL FOCUS – ASIA-PACIFIC

China: China's cargo and container throughput growth at its eight major ports [slowed](#) in the fourth quarter of 2024, impacted by weak external demand, subdued domestic investment, and consumption. Analysts expect throughput growth to decelerate in 2025 due to uncertainty from US tariff hikes.

Singapore: Singapore's Tuas mega port, which began operations in September 2022, has already [handled](#) 10 million containers and is expected to reach 65 million containers per year by the 2040s. The fully automated facility uses a fleet of electric, driverless vehicles and advanced digital systems to reduce carbon emissions and improve efficiency, with plans to expand its operations and fleet in the coming years.

Bangladesh: Container [handling](#) at Chattogram Port grew by 5.21% in February 2025, driven by increases in imports, exports, and empty container movement. This growth follows a 5.21%

rise compared to February 2024, with import cargo increasing by 3.05% and export cargo rising by 7.12%, despite a decline in empty container handling.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

The perishables air cargo sector in Europe [is facing challenges](#) as secondary airports struggle with inadequate cold chain infrastructure, particularly for flower shipments diverted from Schiphol. Industry leaders emphasize the need for investment in better handling facilities, with some, like Florius International and Swissport, exploring upgrades at Liege Airport to improve temperature control and reduce supply chain losses.

France: French port workers are planning [strikes](#) in March, including eight days of four-hour work stoppages and a 72-hour strike from March 18th to 20th, in response to pension reforms. This follows walkouts that took place from February 26th to 28th, which caused disruptions at several major ports, including Le Havre, Marseille, and Bordeaux.

Germany: On March 1st, additional sections of Dresden's aging Carola Bridge [collapsed into the Elbe River](#), leading to a 72-hour suspension of shipping traffic. This comes after a partial collapse in September 2024 and follows a recent four-month closure. Since January 31st, vessels were allowed to pass under the bridge with prior authorization. The latest collapse impacts shipping operations, with authorities planning controlled access if no further movement is detected. Removal of damaged bridge components is slated to commence in the coming weeks while the full bridge removal is set for completion by year-end.
