

APERTURE & FOCUS

WEEK 40 | 02 OCTOBER 2025



KWE
Global Logistics Partner

GLOBAL APERTURE

On October 1st, the International Air Transport Association (IATA) reported that global air cargo demand [rose 4.1% year-on-year in August 2025](#), marking the sixth straight month of growth. While global capacity increased as Asia-Pacific and African carriers saw significant gains, North America saw a 2.1% decline. U.S. tariff uncertainty has shifted trade patterns, driving more high-value goods from sea to air. IATA noted global manufacturing optimism rose in August, but new export orders remain below the expansion threshold, reflecting continued caution.

On September 29th, the Panama Canal Authority (ACP) introduced [LoTSA 2.0](#), an upgraded Long-Term Slot Allocation program designed to provide greater certainty, flexibility, and value for canal users. This change aims to give shippers shorter booking horizons that better reflect market demand, while reducing daily slot availability and offering package options tailored to different vessel types.

REGIONAL FOCUS - AMERICAS

United States: President Donald Trump announced [sweeping tariffs](#) effective Oct 1st, 2025, including a 25% import tax on all heavy-duty trucks to bolster U.S. manufacturers, with details unclear on United States-Mexico-Canada Agreement (USMCA) covered vehicles. He also unveiled a 100% levy on branded/patented drug imports (unless firms are building U.S. factories) and 50% tariffs on kitchen and bathroom cabinets, citing a “flood” of foreign products.

The U.S. federal government [shut down at midnight](#) on September 30th after the U.S. Congress failed to pass a funding measure, marking the first shutdown since 2019. Essential freight-related functions at U.S. Customs and Border Protection, the Coast Guard, and the Department of Transportation will continue, but regulatory and oversight work at the Federal Maritime Commission and Surface Transportation Board has halted.

While freight flows [are expected to move normally](#) in the short term amid this shutdown, supply chain risks increase the longer it continues. Agencies such as the Food and Drug Administration, Environmental Protection Agency, and Consumer Product Safety Commission may suspend inspections and product reviews, potentially delaying cargo shipments that require additional clearance.

REGIONAL FOCUS – ASIA-PACIFIC

Asia’s air cargo networks [largely recovered](#) within a week of Super Typhoon Ragasa, which first made landfall on September 22nd, thanks to proactive rerouting and temporary charters, despite cancellations at Hong Kong, Shenzhen, and Guangzhou. However, backlogs remain due to the pre-Golden Week rush and temporary Asia–Europe rail closures, and forwarders expect capacity constraints to continue through October.

China: China has launched the [world’s first China-Europe Arctic Express route](#), a scheduled container service via the Northern Sea Route that links major Chinese and European ports in just 18 days — over 20 days faster than traditional Suez or Cape of Good Hope routes and about a week quicker than rail. The route, aimed at cross-border e-commerce and high-value goods, boosts pre-Christmas trade efficiency but raises concerns over Arctic environmental risks and limited emergency infrastructure.

China has updated its international [maritime transport regulations](#), effective September 28th, 2025, allowing countermeasures against countries imposing discriminatory restrictions on Chinese vessels, operators, or crew. The measures, signed by Premier Li Qiang, provide authority to impose special port fees, block ships from entering Chinese ports, or suspend treaty commitments if partners fail to meet obligations. Analysts view the update as a direct response to new U.S. port fees targeting China-related ships.



Global Logistics Partner

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Brussels: Brussels Airport [will cancel all departures](#) on October 14th due to a National Day of Action by trade unions, with some incoming flights also expected to be affected. The strike will affect both passenger and cargo operations with potential delays for any shipments transiting through the hub.

Italy: Italy's labor movement is escalating: Si Cobas, union representing logistics and transport workers, has called [a strike for October 3rd](#), a national demonstration is planned for October 4th, and port unions say they're ready to "block everything"—including closing port gates, suspending vessel operations and cargo handling, halting container gate moves, and blocking rail/highway access—as mobilizations continue nationwide. Earlier, on September 22nd, 2025, a general strike led by Unione Sindacale di Base and allies shut down ports, highways, rail hubs, and airports in 80+ cities, with dockworkers in the city of Ravenna halting shipments.



A member of the **KWE** Group

DISCLAIMER: The subject matter of this announcement is provided for informational purposes only. Any and all data is obtained from internal and external sources believed to be true and accurate at the time of publication. Forward-looking statements derived from such data should not be taken as guarantees of future performance, nor should they be relied upon as fact. KWE is not responsible or liable for any inaccurate information contained herein, and under no obligation to update forward-looking statements except as required by applicable security laws.