



GLOBAL APERTURE

On February 20, the U.S. Supreme Court ruled 6-3 that [tariffs imposed under the International Emergency Economic Powers Act were unlawful](#), prompting the White House to issue an Executive Order ending certain tariff actions and U.S. Customs and Border Protection (CBP) to release guidance on February 22–23 implementing temporary Section 122 tariffs under the Trade Act of 1974. With additional measures under Sections 232 and 301 under consideration, global supply chains continue to face trade policy volatility. Customers are encouraged to refer to our [February 24 Customer Advisory](#) for full details and compliance guidance.

Blank sailings on major East–West trade lanes [have more than doubled](#) month-over-month, signaling a new phase of volatility beyond typical Lunar New Year seasonality, driven by geopolitical tensions, renewed U.S.–China tariff disputes, inflationary pressure, and broader policy uncertainty. The surge in canceled voyages is disrupting berth planning, yard operations, and inland connections, prompting greater adoption of predictive arrival tools to improve schedule accuracy and operational resilience amid ongoing trade instability.

On February 24, [Panama’s government assumed administrative and operational control](#) of the Balboa and Cristobal ports on the Panama Canal from Hong Kong–based CK Hutchison following a Supreme Court ruling that deemed the company’s concession unconstitutional. Oversight has shifted to the Panama Maritime Authority, introducing new uncertainty around port management at a key global shipping chokepoint and potential implications for canal-linked cargo flows.

REGIONAL FOCUS – AMERICAS



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United States: On February 26, the Airforwarders Association warned that the newly announced 10% global tariffs will create [operational disruption and added uncertainty](#) for air cargo and logistics providers. The group cited challenges tied to advance capacity planning, compliance complexity, and the continued suspension of de minimis treatment, urging policymakers to provide clearer, more predictable trade frameworks for importers and exporters.

Beginning February 23–24, [a powerful winter storm](#) brought blizzard warnings from Maryland to Maine, [grounding thousands of flights](#) and triggering travel bans across multiple Northeastern states. Major marine terminals in the New York/New Jersey region and other East Coast gateways suspended gate and vessel operations, disrupting drayage, road transport, and regional cargo flows as snow accumulation and hazardous conditions limited mobility; operations have since resumed, though some residual delays may continue as backlogs are cleared.

While the Ports of Long Beach and Los Angeles, the nation's two busiest container ports, [reported January volume declines](#) of 11% and 12%, respectively, experts agree that this dip reflects a normalization from historic highs rather than a structural slowdown, as volumes were measured against elevated cargo levels in January 2025 when importers frontloaded shipments ahead of anticipated tariffs. Port officials emphasized that underlying demand remains steady despite continued trade policy uncertainty following the February 20 Supreme Court ruling and subsequent tariff actions, and both gateways stated they are prepared to manage potential volume fluctuations in the months ahead.

Mexico: Civil unrest, road blockages, and airport disruptions that began on February 22 [impacted logistics operations](#), with employees at Kintetsu World Express's Guadalajara Branch and regional sales offices working remotely to ensure business continuity. While airport and container yard operations have since resumed without major issues, KWE continues to monitor the situation closely and coordinate with customers to minimize any ongoing supply chain impact.

REGIONAL FOCUS – ASIA-PACIFIC

In January 2026, airlines in the Asia Pacific region [reported a 5.9% year-over-year increase](#) in international air freight demand, according to the Association of Asia Pacific Airlines. Growth was supported by firm global manufacturing activity and pre-holiday frontloading ahead of factory closures, with capacity rising 4.9% and the average international freight load factor edging up to 56.1%, signaling steady cargo momentum entering 2026 despite ongoing geopolitical and trade uncertainties.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

United Kingdom: On February 25, the UK [announced a government-backed agreement](#) enabling Network Rail to redevelop the Barking Eurohub in east London into an international logistics hub, paving the way for the return of regular cross-Channel intermodal rail freight

through the Channel Tunnel. The project is expected to strengthen direct rail links with key European markets including France, Germany, Italy, and Spain, offering shippers a more sustainable alternative to road transport and expanding UK–EU trade connectivity.

Belgium: On February 25, PSA Antwerp announced the arrival of [five new mega ship-to-shore cranes](#) at Europa Terminal as part of its Project Emerald modernization, marking the largest crane order in the Port of Antwerp-Bruges' history. The cranes, capable of servicing vessels up to 26 containers wide and lifting up to 112 tonnes, are expected to boost berth productivity and expand annual capacity by 800,000 twenty-foot equivalent units when they enter service in the second half of 2026.