



GLOBAL APERTURE

Sea freight reliability [is under strain](#) ahead of the February 17 Lunar New Year holiday, as pressure builds at Chinese ports and carriers overbook vessels to meet minimum quantity commitments. Severe congestion at ports such as Ningbo and Nansha, combined with equipment shortages and tightened gate-in controls, is increasing the risk of rolled cargo and missed sailings, with disruption expected to extend into early March as factories and logistics networks gradually resume operations.

New analysis from market analytics firm Xeneta reported strong January air cargo volumes, but its analysts warned that [the performance masked mounting pressure](#) from weakening cross-border ecommerce demand. With China Customs data showing low-value and ecommerce exports down 9% year on year in December, Xeneta said tariff-related front-loading and shifting United States de minimis policies are driving short-term volatility on key Europe–United States lanes despite underlying demand uncertainty.

According to new analysis from aviation and transport research firm Trade and Transport Group, [airlines are projected to face a shortfall of approximately 4,800 aircraft](#) by the end of 2027 due to sustained delivery delays in both narrowbody and widebody programs. The report warned that constrained fleet growth and aging aircraft will limit long-haul capacity and bellyhold cargo space, potentially slowing passenger and air cargo market recovery unless production and certification timelines improve.

REGIONAL FOCUS – AMERICAS

United States: In late January, the Port of Virginia commissioned four new all-electric “Suez-class” ship-to-shore cranes at Norfolk International Terminals, [enabling it to handle four ultra-large container vessels simultaneously](#) as part of its harbor expansion. The port is set to complete dredging to a 55-foot channel depth by the end of February, allowing fully laden ultra-large container vessels to call without draft restrictions and further strengthening capacity along the U.S. East Coast.

On February 10, the Airforwarders Association (AfA) released survey results showing that 83% of member forwarders [reported reduced shipping volumes](#) due to United States import tariffs, with many also citing higher operational costs and supply chain disruptions. Respondents highlighted customs delays, airport congestion, revised routing decisions, and increased administrative burdens, underscoring ongoing uncertainty for air cargo planning amid shifting trade policies and changes to de minimis exemptions.

REGIONAL FOCUS – ASIA-PACIFIC

Bangladesh: On February 9, operations at Chattogram Port [resumed after a seven-day disruption](#), as workers suspended their indefinite strike until February 15 following the government's announcement that it would not sign the New Mooring Container Terminal leasing agreement during its tenure. The stoppage left more than 90 vessels waiting and over 41,000 twenty-foot equivalent units (TEUs) piled up at terminal yards, with export containers stranded at inland depots, raising concerns about supply chain delays ahead of Ramadan.

India: Anticipated reductions in US tariffs on Indian exports, alongside the newly agreed India–European Union free trade agreement, [have already begun to tighten vessel space](#) on India–US lanes, according to industry sources. With uncertainty around the official implementation date of the US tariff changes, importers are facing limited capacity and planning challenges as demand builds following the India–Europe accord.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

European Union: New parcel handling fees introduced in countries including Italy, Luxembourg, and Romania ahead of the European Union's planned €3 customs duty on low-value consignments from July 1 [are already disrupting China–Europe air cargo flows](#). The measures have led to flight diversions, reduced low-value parcel volumes into Italy, and a shift toward bulk imports and regional warehousing within the European Union to mitigate per-parcel charges and avoid delivery-stage cost surprises.

Italy: Traffic has returned to normal after unionized dockworkers [staged a 24-hour strike](#) on February 6 at major ports including Livorno, Genoa, La Spezia, Ravenna, Venice, and Trieste,

protesting alleged arms shipments and the militarization of port operations. The stoppage temporarily delayed vessel calls, blocked container and RoRo terminals, and disrupted intermodal links into Central Europe, with some ships reported as having been held offshore or diverted to alternative ports.