

APERTURE & FOCUS

WEEK 09 | 27 FEBRUARY 2025

GLOBAL APERTURE

Global air cargo volumes [are gradually recovering](#) from the Lunar New Year dip, supported by e-commerce and changes to U.S. import regulations. While demand has yet to return to pre-holiday levels, the decline in shipments from China and Hong Kong was less severe than last year, possibly due to strong e-commerce activity and recent changes to U.S. import regulations.

On February 21st, the Digital Container Shipping Association (DCSA) [introduced updated Booking 2.0 and Bill of Lading 3.0 standards](#) to improve security, compliance, and efficiency in container shipping. Enhancements include digital signatures and new shipping details to meet EU customs requirements, streamlining data exchange and reducing manual processing.

REGIONAL FOCUS - AMERICAS

United States: The International Longshoremen's Association (ILA) [ratified a six-year contract](#) with the US Maritime Exchange (USMX), ensuring labor stability at US East Coast and Gulf ports through 2030. The formal signing is scheduled for March 11th.

The Port of Los Angeles [reported a record-breaking](#) January, marking its busiest start in 117 years and an 8% year-over-year increase. The surge in container volume was driven by the economy, retailers importing ahead of Lunar New Year, and reactions to import regulation adjustments. Port operations remained efficient with no vessel delays.

Meanwhile, Gulf Coast ports [saw mixed results](#) in January, with Houston and Corpus Christi reporting growth, while New Orleans faced slower container movement. Port Houston saw a 7% year-over-year increase in container volumes, driven by higher steel and containerized imports. However, the Port of New Orleans continued to struggle, with weaker cargo flows contributing to ongoing operational challenges.

Mexico: Guadalajara International Airport (GDL) [has secured land for a third runway](#)—something no other commercial airport in Mexico currently has. With air travel and shipment demand in Mexico projected to double in the next two decades, this investment supports increased passenger and cargo capacity.

REGIONAL FOCUS – ASIA-PACIFIC

India: Delhi Airport (DEL) [will reach full capacity](#) before India's holiday season, with Terminal 1 reopening in April and phased upgrades for Terminals 2 and 3. As passenger flights increase, belly hold cargo capacity will expand, providing more space for air freight shipments, while infrastructure improvements [will](#) enhance overall airport efficiency.

China: Hong Kong International Airport (HKIA) [handled more cargo](#) in January 2025, growing 4.1% from last year to 394,000 tons. The airport's new third runway has helped increase capacity, supporting more shipments, especially to the Middle East, Europe, and Oceania. However, potential U.S. tariffs on Chinese goods and changes to e-commerce tax exemptions could impact future cargo demand.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Germany: A strike is set to begin at Munich Airport (MUC) on February 27th, with public sector workers and ground staff [staging a two-day walkout](#), likely causing major disruptions to flight operations. Munich Airport, Germany's second busiest, joins Düsseldorf and Cologne/Bonn in recent labor strikes, likely affecting flight and cargo operations.

Hamburg's Container Terminal (CTB) [has expanded its](#) automated storage yard, increasing container capacity to nearly 45,000 TEUs. The new storage blocks use electric cranes powered by renewable energy, improving efficiency while reducing space usage and emissions. CTB is

also integrating Automated Guided Vehicles (AGVs) to optimize container handling, advancing both automation and sustainability in port operations.

Netherlands: Amsterdam Airport Schiphol (AMS) [has announced that](#) their cargo volumes rose 8.2% in 2024 to 1.5 million tons, fueled by e-commerce growth and shifting trade patterns. Increased belly cargo capacity, supported by recovering passenger flights, contributed to this rise, with strong demand from India, China, Africa, and the U.S.
