

APERTURE & FOCUS

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GLOBAL APERTURE

The global air cargo industry is [grappling with major disruptions](#) in 2025 due to fluctuating U.S.-China tariffs, which have upended supply chains, slashed e-commerce air volumes, and forced carriers to rethink fleet strategies and routes. With uncertainty around tariff policies, rising costs, and shifting demand, companies are adapting through diversification, rerouting, and exploring new markets to maintain stability.

This growing tariff volatility is driving a [sharp reduction in imports](#) to U.S. container ports, creating an unprecedented shortfall in shipment volume that analysts warn could mark one of the largest year-over-year declines in recent history. This anticipated “import gap” threatens to disrupt port operations, inbound supply chains, and downstream logistics sectors.

Ocean carriers are intensifying competition for [cargo amid record fleet expansion](#), with some focusing on service quality to attract major shippers while others aim to capture volume quickly through broad forwarder support. However, network reshuffling efforts face resistance from strong regional players, and uncertainty around U.S. trade policy is making future planning increasingly difficult.

REGIONAL FOCUS - AMERICAS

United States: The U.S. officially ended the de minimis exemption for low-value imports under \$800 on August 29th, 2025, meaning all such shipments are now subject to tariffs ranging from 10% to 50%, disrupting global e-commerce logistics. Countries including Canada, Mexico, and Germany have temporarily paused affected shipments, while consumers and sellers worldwide face rising costs and uncertainty around customs processing [—refer to our latest customer advisory for more information.](#)

While U.S. inbound container volume saw a temporary [3.2% year-over-year increase](#) in July due to tariff frontloading, a historic decline of around 17.5% is expected for the rest of the year, according to recent analysis, as reactions to tariff policies persist. This shift, along with upcoming United States Trade Representative (USTR) fees on Chinese vessels, are expected to reduce shipping capacity, marking a significant disruption in global trade patterns.

REGIONAL FOCUS – ASIA-PACIFIC

Manufacturing across Asia—including Japan, South Korea, and Taiwan—[continued to decline](#) in August 2025 as U.S. tariffs and competition from cheaper Chinese exports weighed heavily on export-driven economies. In contrast, China's S&P Global Manufacturing Purchasing Managers' Index (PMI) unexpectedly rose to 50.5, signaling modest expansion and highlighting an uneven regional recovery amid ongoing global trade tensions.

Vietnam: As demand for high-value electronics grows due to production shifting away from China, air cargo capacity from Vietnam to the U.S. [experienced a 95% year-over-year surge in August](#). While export data is not yet available for the month of August, this capacity shift highlights Vietnam's emergence as an alternative to China amid the rapidly changing tariff landscape.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Italy: Italy will face a [nationwide rail strike from](#) 9:00 p.m. on September 4th to 6:00 p.m. on September 5th, 2025, disrupting regional, long-distance, airport, and cargo rail services operated by Trenitalia, Italo, Trenord, and Trenitalia-Tper, due to union disputes over contracts and working conditions. The strike is expected to significantly impact freight movement across key logistics corridors, delaying cargo transport and interrupting rail-based supply chains nationwide.

France: France's largest air traffic control union, SNCTA, has called a [24-hour national strike](#) from September 18–19, 2025, over inflation compensation and management reforms, with major disruption expected at airports like CDG and ORY and delays across Western Europe due to French airspace's strategic role. This broader action could trigger significant flight cancellations, reroutes, and ripple effects throughout the European aviation network for passenger and cargo alike.