

APERTURE & FOCUS

WEEK 27 | 1 JULY 2026



GLOBAL APERTURE

Container port congestion has reached its [highest level in four years](#), with approximately 11% of the global container fleet tied up waiting for berths, according to Linerlytica. Severe congestion at ports in Northern Europe, combined with longer container dwell times and additional blank sailings on Asia–Europe services, continues to constrain vessel capacity and may contribute to longer transit times across key trade lanes.

International Air Transport Association (IATA) data for May 2026 showed global air cargo demand [increased 6% year over year](#), led by a 23.5% surge in Asia–North America volumes driven by semiconductor, data center equipment, and e-commerce shipments. While demand remained strong on key transpacific and Asia–Europe trade lanes, cargo traffic continued to decline on Middle East routes as regional conflict disrupted operations.

REGIONAL FOCUS – AMERICAS

United States: U.S. retailers are moving holiday merchandise orders from China [four to six weeks earlier than usual](#) to build inventory ahead of potential tariff increases expected later this year. The early shipping surge has tightened container capacity on the China–U.S. trade lane and could lead to softer import volumes later in the third quarter as inventories are replenished ahead of schedule.

REGIONAL FOCUS – ASIA-PACIFIC



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Preliminary May 2026 data from the Association of Asia Pacific Airlines showed international air cargo demand for Asia Pacific carriers [increased 2.5% year over year](#), supported by technology shipments and precautionary stockpiling as businesses sought to mitigate potential supply chain disruptions linked to the Middle East conflict. For the first five months of 2026, international air cargo demand was up 4.7% compared to the same period in 2025, reflecting continued demand for time-sensitive shipments amid ongoing operational disruptions.

India: Major [aviation infrastructure expansion in India](#) is underway, with the recent openings of Navi Mumbai International Airport and Noida International Airport helping increase capacity and relieve congestion at key gateways. The long-term strategy aims to expand India's airport network to 350–400 airports by 2047, supporting future passenger and air cargo growth through significant investment.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Middle East: Commercial vessel traffic through the Strait of Hormuz slowed again following [an attack on a container ship](#) near Oman on June 26, highlighting the continued security risks facing one of the world's most important shipping corridors. With the International Maritime Organization [pausing its voluntary vessel evacuation program](#) until additional security guarantees are in place, industry stakeholders expect shipping through the waterway to recover gradually as uncertainty persists.

Poland: Continued investment in Poland's logistics infrastructure is supporting the country's growing role as a regional distribution hub, with Loconi Intermodal [announcing a new intermodal terminal](#) in Zbąszynek scheduled to open in the first quarter of 2028. The facility is expected to increase cargo handling capacity, strengthen cross-border connectivity, and improve freight flows across Central and Eastern Europe.