



GLOBAL APERTURE

Following the April 8 ceasefire announcement between the United States and Iran, initial steps toward reopening the Strait of Hormuz are underway, [though vessel traffic remains limited](#) and conditions continue to evolve amid conflicting interpretations of the agreement. With approximately 800 vessels still delayed and disruptions to oil, liquefied natural gas, and petrochemical flows ongoing, congestion and supply chain impacts are expected to persist, and a full recovery of maritime operations will likely take time even after transit resumes.

Similarly, airfreight markets [are expected to remain constrained](#), with recovery of capacity and network stability likely to take months, according to data from air cargo market analytics firm Xeneta. Ongoing airspace restrictions, operational challenges, and uncertainty surrounding the ceasefire are expected to limit any immediate return to pre-disruption conditions.

REGIONAL FOCUS – AMERICAS

United States: U.S. container imports [are facing continued pressure from tariffs and rising fuel costs](#), following the implementation of a temporary 10% global tariff under the Trade Act of 1974 in March 2026 and additional duties on metals and pharmaceuticals. While the Strait of Hormuz crisis has not yet significantly disrupted import volumes, higher global fuel prices and supply chain inefficiencies are expected to increase transportation costs and impact consumer demand if conditions persist.



The U.S. administration announced expanded Section 232 tariffs on April 2, 2026, increasing duties on [steel, aluminum, and copper products](#)—generally ranging from 25% to 50% depending on material composition—while introducing new measures [targeting pharmaceutical imports](#) and active pharmaceutical ingredients, including potential tariffs of up to 100%. Updated guidance from U.S. Customs and Border Protection outlines stricter classification and valuation requirements, with metal tariffs taking effect in early April and pharmaceutical measures to follow. For more information, please refer to our latest [Customer Advisory](#) on this topic.

New data from U.S. Customs and Border Protection has indicated [increased enforcement activity](#) under this presidential administration, with audits, penalties, and seizures all rising in fiscal year 2025 compared to the previous year. Growth in intellectual property and import safety seizures, along with more forced labor detentions, signals tighter compliance expectations for importers and supply chain stakeholders.

Mexico: Air cargo capacity in Mexico [has declined](#) as foreign carriers reduce operations amid ongoing uncertainty surrounding United States–Mexico–Canada Agreement (USMCA) negotiations and shifting trade policies. Data from Mexico’s Agencia Federal de Aviación Civil shows volumes fell in 2025 and early 2026, with continued caution from shippers and carriers expected as companies reassess supply chains and delay shipping decisions.

REGIONAL FOCUS – ASIA-PACIFIC

Japan: Japan has implemented [mandatory X-ray screening](#) for all outbound air cargo as of April 2026, aligning with International Civil Aviation Organization standards and strengthening aviation security requirements. While the move enhances compliance and screening consistency, industry stakeholders expect increased processing times, potential congestion at major airports, and added cost pressures for shippers, particularly for heavy and oversized cargo.

Thailand: Since mid-March 2026, inbound cargo congestion at Bangkok’s Suvarnabhumi Airport (BKK) TG Terminal has increased due to higher transshipment volumes linked to the Middle East situation, according to KWE sources. While operations continue, shipments are experiencing delays and tracking issues, with delivery timelines currently uncertain.

Philippines: The Philippine Ports Authority [implemented a reduced roll-on/roll-off terminal fee](#) for trucks carrying raw agricultural products effective April 10, 2026, to support the movement of essential goods amid rising fuel costs. The temporary measure, set for six months, applies to unprocessed items such as grains, produce, and livestock, with enforcement measures in place to ensure compliance.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Middle East: In a cautious step toward resuming commercial movements, a French container vessel operated by CMA CGM [became the first Western European-linked ship](#) to transit the Strait of Hormuz since the conflict began in late February. However, since the ceasefire on April 8, vessel traffic through the strait [remains near a standstill](#), with movements far below normal

levels as operators await clarity on routing, security conditions, and transit requirements.

Egypt: Effective April 7, 2026, the Suez Canal Authority has [suspended its 15% transit fee rebate](#) for container ships, ending a temporary incentive introduced in May 2025 to attract vessel traffic. The move comes as canal operations continue normally, though some carriers remain cautious due to ongoing regional security concerns impacting routing decisions.