

APERTURE & FOCUS

WEEK 19 | 7 MAY 2025



GLOBAL APERTURE

Global air cargo [demand rose](#) 4.4% year-over-year in March 2025, reflecting increased international volumes, lower fuel prices, and pre-tariff shipping activity. The growth was supported by expanded belly hold capacity [due to rising](#) international passenger traffic.

Rising tariffs and economic uncertainty have triggered [a surge in blank sailings](#), straining maritime reliability and raising concerns for shippers. As of early May 2025, industry experts warn that vessel schedule unpredictability [is likely to continue](#) as carriers struggle to align capacity with erratic demand.

REGIONAL FOCUS - AMERICAS

United States: U.S. trade activity [is experiencing sharp declines](#) in both ocean and air freight. Export volumes have fallen significantly at major ports due to new tariffs. The May 2nd revocation of the de minimis exemption has also triggered steep cuts in e-commerce air cargo

import traffic. These shifts are straining supply chains and raising risks for labor, retail inventories, and peak season planning.

Flight delays and cancellations at Newark Liberty International Airport began on May 4th and [persisted into](#) Tuesday, driven by air traffic controller shortages, runway construction, and low visibility from approaching severe weather. As of May 6th, nearly 150 flights [had been canceled](#) and over 300 delayed.

Mexico: According to Kearney's 2025 Reshoring Index, Mexico's ability to meet rising U.S. export demand [is being strained](#) by infrastructure limitations and rising wages. However, the country remained the United States' top source for manufactured imports in 2024, accounting for 16% of the total. Most exports were concentrated in electronics, transportation equipment, and electrical components.

REGIONAL FOCUS – ASIA-PACIFIC

India: On May 3rd, India and Pakistan [imposed](#) mutual trade and maritime bans following a deadly attack in Kashmir on April 22nd, including [restrictions on](#) imports, vessel entry, and airspace access. Though trade volumes between the two nations [have historically been](#) low, the immediate and reciprocal bans mark a sharp escalation in regional tensions.

China: Guangzhou Port [has launched a](#) direct shipping route to Peru's Chancay Port, cutting transit time to around 30 days and reducing logistics costs by approximately 20%. This new lane strengthens trade ties between China and Latin America, supporting faster movement of goods such as electronics, furniture, and food.

Despite new U.S. tariff actions, [Chinese exports remained resilient](#) through the end of April 2025, with trade data showing only a marginal year-over-year decline. Analysts attribute this to front-loading of shipments ahead of tariff deadlines and a shift in trade routes through intermediary countries.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Ports across Northern Europe [are experiencing severe](#) congestion, with Antwerp's container yard nearing full capacity and Bremerhaven seeing delays for nearly a third of arriving ships. Ongoing strikes, maintenance, and high volumes from Asia are straining terminals, with congestion expected to persist through the summer and potentially worsen as redirected capacity from transpacific routes arrives.

United Kingdom: The British International Freight Association (BIFA) [has launched](#) a new cargo community advisory body to guide stakeholder engagement around the upcoming

redevelopment of Heathrow Airport's cargo area. The group will represent freight forwarders and logistics stakeholders in discussions with Heathrow Airport, focusing on modernizing freight systems, improving cargo flows, and supporting long-term infrastructure upgrades to meet growing demand.

Italy: The national rail network is [expected to face widespread](#) disruption in May due to a 24-hour national rail strike from May 5–6th and a regional strike in Lombardy later in the month. The walkouts may impact port rail services and coincide with a broader wave of industrial action in the same week, including a nationwide 4-hour [air transport strike](#) on May 9th.