

APERTURE & FOCUS

WEEK 26 | 24 JUNE 2025



GLOBAL APERTURE

Airlines have cancelled more passenger flights to key Middle East hubs following [U.S. strikes on Iran](#) and ongoing regional conflict. While air freighter services continue, reroutes and cancellations are causing shipment delays and increasing transit times for cargo operations.

The European Commission [has invoked Article 23 of the Net-Zero Industry Act](#), requiring 44 EU oil and gas producers to meet binding CO₂ storage targets—50 million tons per year by 2030—prompting urgent expansion of carbon capture, storage, and LCO₂ shipping infrastructure. With many companies unprepared for carbon capture and storage, shipping is seen as a flexible and scalable transport solution, while new partnerships and increased competition for storage capacity are expected to accelerate the market.

REGIONAL FOCUS - AMERICAS

United States: U.S. business activity [eased slightly in June](#) amid ongoing trade policy uncertainty, with manufacturers reporting growing supply chain pressures. Signs of weakening demand suggest broader economic momentum may be softening.

Ahead of the July 4th holiday, the [U.S. trucking industry is experiencing tighter capacity](#) and increased load rejections, particularly in key hubs such as Los Angeles and Dallas. This shift is creating opportunities for trucking carriers to optimize their operations, but it also puts significant pressure on freight brokers to manage service levels and protect margins amid a more competitive and fluctuating market environment.

REGIONAL FOCUS – ASIA-PACIFIC

India: India has overtaken China as the top exporter of [smartphones to the U.S. by air](#), as air cargo volumes out of China declined sharply while shipments from India rose steadily amid shifting production and tariff pressures. The trend highlights how geopolitical factors and trade policy are reshaping global airfreight flows for high-tech goods, with similar shifts seen in laptop exports from China to Vietnam.

[Asia-Pacific markets surged on June 24, 2025](#), with the Morgan Stanley Capital International (MSCI) regional index (excluding Japan) jumping 2.4% to its highest level since January 2022, as easing Middle East tensions boosted investor confidence. The global rally followed news of a fragile ceasefire between Israel and Iran, which sent oil prices tumbling and lifted equities, while the U.S. dollar weakened, and gold prices declined.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Tensions in the Strait of Hormuz [have spiked following U.S. strikes](#) on Iranian nuclear sites, with Iran's parliament voting to close the key waterway—though a full shutdown remains unlikely. Despite no official closure, heightened military presence and [geopolitical risks are already disrupting vessel](#) movements and reshaping global trade route strategies.

Netherlands: From June 22–27, [road closures](#) related to the NATO Summit in The Hague may cause delays for import and export shipments around Amsterdam, Schiphol, and Rotterdam. Customers are advised to plan as traffic disruptions are expected throughout the week.