



APERTURE & FOCUS

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GLOBAL APERTURE

SeaIntelligence reported that container shipping capacity on the Asia–North America trade [has fluctuated](#) in response to shifting U.S. tariff policies on Chinese goods. After the U.S. paused new China tariffs on May 12th, importers initially rushed to bring in cargo early, prompting shipping lines to add capacity. However, by late June, that demand weakened as uncertainty returned, leading carriers to reverse 23–24% of their planned capacity increases for June and July. The adjustment reflects cautious importer behavior and ongoing volatility in the trade environment.

Global air cargo volumes [declined 3% in the first week of July](#), led by an 11% week-over-week drop from North America during the U.S. Independence Day holidays. Flows from Asia Pacific to the U.S. also softened, while volumes from China to Europe and from Europe to Canada and Mexico continued to rise.

Countries are responding to the United States' new trade stance ahead of an August 1st deadline set by U.S. President Trump. Mexico [is working to finalize](#) a deal after the U.S. announced a 30% tariff on Mexican imports. Mexico's president said security and trade are being addressed jointly in the agreement. Meanwhile, the European Union postponed its planned retaliatory tariffs to match the U.S. timeline, while signaling readiness to respond if negotiations fail. The U.S. has also sent warnings to other partners, including Canada, South Korea, and Japan, that higher tariffs could begin if deals are not reached.

REGIONAL FOCUS - AMERICAS

United States: Air cargo imports [rose 8% year-over-year in April and May](#) as companies frontloaded shipments to get ahead of new U.S. tariffs. While volumes from China fell 20% due to tariffs and the removal of the de minimis exemption, which allowed for low value goods to enter the country duty-free, other countries filled the gap. Vietnam's air exports surged 94%, Taiwan's rose 69%, and shipments from Italy and France climbed due to increased demand for consumer and pharmaceutical goods. The shifts reflect a broader rerouting of trade flows, particularly for laptops, electronics, and fashion items.

The Port of Los Angeles [moved a record](#) 892,340 TEUs in June, up 8% year-over-year, as importers front-loaded cargo to avoid potential tariff hikes later this year. Port officials noted that early peak-season shipping could shift traditional import patterns, with July also expected to see strong volumes. For the first half of 2025, the port has handled nearly 5 million TEUs, marking a 5% increase from 2024.

The Port of Long Beach [has broken ground on](#) a \$365 million expansion of its International Transportation Service (ITS) terminal, aiming to improve capacity and operational efficiency. The project will add 19 acres of terminal space and construct a 3,400-foot wharf capable of handling two large container vessels simultaneously. Set for completion in 2028, the development supports the port's long-term infrastructure and environmental goals.

REGIONAL FOCUS – ASIA-PACIFIC

International air cargo demand [surged 13.9% year-on-year in 2024](#) for Asia Pacific carriers according to the latest figures from the Association of Asia Pacific Airlines (AAPA), driven by strong e-commerce growth and maritime disruptions. Despite this rebound, the Association of Asia Pacific Airlines warns that persistent supply chain constraints and geopolitical risks may pressure cargo markets in 2025.

Bangladesh: Officials are negotiating with the U.S. [to avoid a steep tariff hike](#) set to take effect in August, which could raise duties on Bangladeshi exports to over 50%. The government hopes to secure improved terms through direct talks, after earlier proposals to reduce import barriers on U.S. goods were deemed insufficient.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Major ocean carriers [are rerouting vessels](#) as port congestion worsens across North Europe, particularly in Germany, the Netherlands, and the UK. Delays are being caused by high yard density, limited truck availability, and weather-related disruptions, [prompting some carriers](#) to skip scheduled calls or shift operations to less affected terminals.

Belgium: Liege Airport (LGG) [reported a 14.5% increase](#) in cargo volumes in Q2 2025, handling over 330,000 tons. The airport also saw a 7.7% rise in cargo flights and noted strong year-to-date growth, with U.S. trade up 34.5% compared to 2024.



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