

APERTURE & FOCUS

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GLOBAL APERTURE

According to a recent report from supply chain analytics firm Sea-Intelligence, the 2025 carrier alliance reshuffle has significantly altered container flows on the vital Asia-Europe trade lane. Following the shift earlier this year, the new networks [had become fully stabilized](#) by July. Hamburg gained the most, adding 169,000 twenty-foot equivalent units (TEUs) in average monthly vessel capacity. Valencia followed, adding 78,000 TEUs. Meanwhile, as Antwerp and Tangier lost significant capacity, the Port of Rotterdam kept its position as Europe's main gateway.

Air cargo [demand rose](#) 5% year over year in August, according to the latest data from supply chain analytics firm Xeneta, driven by a shift from ocean to air transport as shippers sought to avoid tariff-related delays. Industry analysts expect the recent end of the U.S. de minimis exemption to impact business-to-business shipments from Europe more than those from China.

REGIONAL FOCUS - AMERICAS

United States: Port fees announced by the United States Trade Representative (USTR) [will take effect on](#) October 14th. These fees target Chinese-built and Chinese-owned vessels and

are expected to carry major financial consequences for Chinese carriers. Most global carriers are expected to avoid the fees by redeploying non-Chinese-built ships.

Analysts report that U.S. exports to Canada and China [have declined](#) year-over-year. Meanwhile, imports from India and Bangladesh have increased slightly, as companies shift sourcing away from China. Ocean carriers have increased blank sailings on key trade lanes. Legal challenges and unclear long-term U.S. trade policies continue to add uncertainty to global supply chain planning.

REGIONAL FOCUS – ASIA-PACIFIC

China/Hong Kong: Tropical Storm Tapah [disrupted operations and caused flight cancellations](#) at Hong Kong International Airport (HKG) on September 8th. Although damage was limited and conditions remained calm in most areas, authorities issued Typhoon Signal No. 8, which was later lifted on September 9th.

Singapore: The Port of Singapore [received the](#) “Best Global Seaport” title for the fourth time and “Best Seaport in Asia” for the 37th time at the 2025 Asian Freight, Logistics and Supply Chain (AFLAS) Awards held in Hong Kong on September 3rd. Organized by Asia Cargo News, the awards recognize excellence, innovation, and reliability across the global supply chain industry.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

European Union aviation security rules [took effect on](#) September 1st under Implementing Regulation (EU) 2025/920. The regulation requires Regulated Agents to verify an Established Business Relationship with consignors before accepting cargo as secure.

Belgium: Liege Airport [processed approximately](#) 242,508 U.S. tons of cargo in July and August combined. This reflects a 14% year-over-year increase in July and a 29% surge in August. With nearly 938,964 U.S. tons handled year to date, the airport has already exceeded typical summer volumes.

South Africa: Trade and industry officials have been sent to the United States [to begin formal negotiations](#) to reverse a 30% tariff imposed by U.S. President Trump on South African goods last month. Despite earlier proposals being ignored, South Africa’s President stated that talks would begin within days.