

GLOBAL APERTURE

Global air cargo volumes reached a record 131.2 million metric tons in 2025, up 3.3% year over year, according to Airports Council International (ACI) World. Hong Kong International Airport retained its position as the world's busiest cargo airport, while Shanghai Pudong and Anchorage ranked second and third, respectively, highlighting the continued importance of major Asian and transpacific cargo hubs.

Major shipping lines are preparing to resume Suez Canal transits on Asia-Europe and Asia-Mediterranean services, with Evergreen restarting crossings in November and Yang Ming and HMM following in December. The return will shorten transit times and restore additional Red Sea connections, including new calls at Sokhna, as carriers gradually shift services back from the Cape of Good Hope route.

China-Europe freight train traffic along the eastern corridor surpassed 6,000 trips for the first time, up 40.3% year over year and a new record for the trade route. The milestone highlights growing demand for overland trade between China and Europe, with expanding rail connections and a shift toward higher-value cargo such as electronics, photovoltaic products and industrial equipment.

REGIONAL FOCUS – AMERICAS

United States: Approximately 250 port watchmen represented by International Longshore and Warehouse Union (ILWU) Local 26 have delayed a potential strike at the Ports of Los Angeles and Long Beach for a second time, following an initial extension from November 1 to November 5. The latest extension moves the deadline to midnight November 6, with negotiations

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continuing under federal mediation. A walkout could disrupt operations at eight terminals handling approximately 85% of Long Beach cargo and 33% of Los Angeles cargo, as other union workers may honor picket lines.

The U.S. Coast Guard is exploring the use of commercial icebreaking vessels to keep Northeast ports and waterways open during the 2026–2027 winter season, following severe ice conditions last winter. An October 21 request for information seeks U.S.-flagged, coastwise-qualified vessels capable of clearing shipping channels and escorting ships carrying critical cargo, with responses due November 13.

Mexico: Trucking organizations suspended nationwide highway protests on October 27 following negotiations with federal officials, but warned demonstrations could resume if cargo theft and violence against drivers remain unaddressed. The National Chamber of Freight Transport (CANACAR) reported that 15 truck drivers have been killed this year, with negotiations now focused on highway security, infrastructure, taxation and labor regulations.

REGIONAL FOCUS – ASIA-PACIFIC

Australia: Western Sydney International Airport officially opened on October 27, adding a new 24-hour aviation gateway to the Sydney market. Cargo operations began on July 27, with more than 1,000 flight movements supporting shipments of critical goods across New South Wales.

India: On October 28, India approved a $1.05 billion USD container manufacturing program targeting a tenfold increase in annual production capacity from 70,000 to 750,000 twenty-foot equivalent units (TEUs). The 13-year initiative will support new factory construction, facility expansions and domestic production, with the goal of strengthening India's container supply chain and reducing reliance on overseas manufacturing.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Germany: Rhine water levels rose above 50 centimeters on October 26 for the first time since September 4, according to data from the German water authority WSV, with readings at Kaub expected to reach approximately 70 centimeters. The improvement is expected to be temporary, however, as continued low water levels and rail capacity constraints are limiting inland freight movements and disrupting fuel supply chains across the region.