



GLOBAL APERTURE

Researchers from the University of Oxford's Oxford Program for Sustainable Infrastructure Systems [estimate that disruptions](#) at 24 major maritime gateways affect about \$192 billion in trade each year. These disruptions generate roughly \$14 billion in economic losses from delays, rerouting, insurance, and higher transport costs. The team also warns that overlapping risks like conflict, piracy, and severe weather could disrupt several chokepoints at once. Simultaneous failures would make rerouting difficult and increase pressure on global supply chains.

Global air cargo demand [grew 4.1%](#) year over year in October, according to the latest figures from the International Air Transport Association, marking the eighth consecutive month of growth, even as U.S. tariffs continued to pressure Asia–North America volumes. Strong double-digit growth on Europe–Asia, Middle East–Asia, and within-Asia routes offset the ongoing decline on the trans-Pacific corridor.

REGIONAL FOCUS – AMERICAS

United states: The U.S. trucking industry [has entered a slow, uneven correction cycle](#) heading into 2026, with soft freight demand, rising tariff-driven costs, and regulatory uncertainty. Capacity is tightening gradually, and analysts suggest the market will remain imbalanced and highly sensitive to trade, policy, and economic shifts in the year ahead.

Cross-border freight [volumes between the United States and Mexico continue to grow](#) as nearshoring accelerates, even as panelists at the 2025 Trimble Insight Tech Conference warned that weak liability rules, infrastructure gaps, and increasingly violent cargo theft are raising security and compliance risks.

Mexico: Customs performance in 2025 [delivered inconsistent outcomes](#), with higher tax revenues offset by operational bottlenecks and infrastructure constraints that continued to slow clearance times. Lawmakers also [approved broad customs-law reforms](#) on October 14th, [set to take effect](#) January 1, 2026, which aim to strengthen enforcement, tighten oversight, and modernize inspection procedures.

REGIONAL FOCUS – ASIA-PACIFIC

Severe storms across Southeast Asia [caused widespread transport disruption](#) through December 1st-2nd, with Sri Lanka's Colombo Port experiencing the most significant impact after Cyclone Ditwah [forced a 72-hour shutdown](#) on November 28th and created vessel queues that continue to ease. Terminals in India also reported weather-related delays, while flooding in Malaysia, Vietnam, and Thailand slowed inland container movements and prompted requests to extend return timelines at Port Klang.

According to WorldACD, airfreight from Southeast Asia to the United States [rose sharply in October](#) at approximately 40 percent year over year and nearly 26 percent year to date. Asia-to-US demand higher in week 46 and led by Taiwan and Southeast Asia, while China, Hong Kong, and South Korea softened.

China: Ningbo-Zhoushan Port [surpassed 40 million](#) twenty-foot equivalent units (TEU) in annual container throughput for the first time, marking its fastest growth cycle yet as volumes rose from 30 million to 40 million in four years. The port connects to more than 600 global destinations through over 300 shipping routes.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Belgium: A three-day national strike from November 24–26th caused major disruptions across the Port of Antwerp-Bruges and Liege Airport (LGG). At the port, pilotage suspensions, picket lines, and reduced tug availability [repeatedly halted](#) vessel movements, creating significant queues of inbound and outbound ships. Cargo operations at Liege Airport [were fully halted](#) on November 24th, with freighter capacity falling about 40% as airlines diverted flights to Schiphol and Maastricht. Carriers had pre-planned alternative routings, enabling Liege to resume normal cargo operations by November 25 despite continued disruptions at Brussels Airport (BRU).

United Kingdom: Glasgow Prestwick Airport (PIK) [expanded its](#) China cargo operations by doubling weekly freighter capacity and adding a new Chengdu Shuangliu International Airport (CTU) connection to its existing service from Guangzhou (CAN). The airport reported sustained growth in 2025 supported by new operators and increased cargo activity.