

APERTURE & FOCUS

WEEK 23 | 04 JUNE 2025



GLOBAL APERTURE

Air freight demand from Asia to the U.S. [is expected to increase](#) from mid-June as U.S. businesses begin placing more orders to meet consumer demand, while intra-Asia traffic remains strong on lanes between China–Vietnam, Singapore, Thailand, Malaysia, and Taiwan. Carriers are adding new services to ease outbound pressure from Vietnam and other markets due to the U.S. tariff pause, though capacity remains constrained due to earlier freighter cancellations and seasonal factors.

Global container schedule reliability [improved to](#) 58.7% in April 2025, the highest level since November 2023, with a 6.5 percentage point gain year-over-year. As newly reorganized shipping alliances continue phased rollouts through mid-2025, reliability trends are rising, though full evaluations of alliance performance will not be possible until after July.

REGIONAL FOCUS - AMERICAS



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United States: The U.S. [has doubled](#) tariffs on imported steel and aluminum from 25% to 50% effective June 4th. While the administration says the move will strengthen U.S. producers and protect domestic industry, some businesses warn it could prompt retaliatory tariffs from trade partners.

Partners in the Gemini Cooperation, a vessel-sharing alliance launched by major carriers Hapag-Lloyd and Maersk this year, [are adding new container services](#) from East Asia to the Port of Long Beach (USWC) during the current [90-day pause](#) in U.S.-China reciprocal tariffs. The new Asia–Long Beach service will increase westbound trans-Pacific capacity by 1.2%, as carriers redeploy vessels to meet rising demand.

Container volumes at the Port of New York and New Jersey, one of the busiest U.S. gateways, [surged 6% year-over-year](#) in April 2025 to 751,194 TEUs, as importers accelerated shipments ahead of new U.S. tariffs on Chinese goods. Year-to-date, the port has processed nearly 3 million TEUs, a 9% increase from the same period in 2024, reflecting strong demand on East Coast trade lanes.

Latin America: Air cargo demand in Latin America [grew 10.1% year-over-year](#) in April 2025, the strongest regional growth reported by the International Air Transport Association (IATA). The region also saw a 6.9% increase in capacity, supporting expanding cross-border trade activity.

Panama: The Panama Canal Authority [completed](#) scheduled maintenance on one chamber of the Pedro Miguel Locks from May 27–31st, ensuring continued vessel transit via the east lane during the operation. The work is part of the canal's broader infrastructure program, which invests over \$500 million annually to maintain safe and efficient operations across its locks, dams, and navigation systems.

REGIONAL FOCUS – ASIA-PACIFIC

Air cargo demand in the Asia-Pacific region [rose 4.9% year-over-year](#) in April 2025, despite persistent global trade tensions. Strong demand for cross-border e-commerce and resilient regional manufacturing contributed to the growth, especially on Asia–North America and intra-Asia routes.

Bangladesh: Heavy monsoon rains and flooding [that began on](#) May 30th [have disrupted](#) port and container freight station (CFS) operations in Chittagong (Chattogram), causing delays, reduced labor availability, and vessel queues ahead of Eid holidays. Port operations are

expected to be further disrupted by an extended holiday closure from June 6–8th, with factories and offices also closed from June 5–14th.

Malaysia: Malaysia's Transport Ministry [will launch](#) off-peak incentives at Port Klang starting in August to ease truck congestion. The program will offer payments to haulers that operate between 8 p.m. and 8 a.m. Additionally, importers and exporters shifting at least 50% of their haulage to off-peak hours will qualify for extended free storage.

India, Japan: India's Union Minister of Ports, Shipping, & Waterways met with Japan's Vice Minister for International Affairs and officials from the Ministry of Land, Infrastructure, Transport & Tourism on June 2nd [to discuss](#) joint port development, shipbuilding investment, and maritime training. The two nations also discussed using sustainable technologies and disaster-resilient infrastructure.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

United Kingdom: Heathrow Airport (LHR) [has selected](#) BT's CCS-UK Advanced Information System to streamline landside cargo traffic, reduce congestion, and enhance efficiency, as announced at Air Cargo Europe 2025. The new system will support better planning of cargo vehicle flows at the UK's busiest air cargo hub, where over 1.74 million U.S. tons of cargo were handled in 2024, with nearly 95% transported in passenger aircraft belly hold.

Italy: An explosion on May 29 near the Florence–Pisa rail line in Empoli [has caused a full closure of the line](#), halting rail traffic indefinitely while safety inspections continue. The disruption delays import and export rail services between key ports (Livorno, La Spezia) and inland hubs (Padua, Marzaglia, Bologna).