



GLOBAL APERTURE

Panama Canal congestion is worsening, with [more than 110 vessels reportedly waiting for transit](#) as carriers reroute cargo away from Middle East shipping lanes. Ongoing draft restrictions tied to low water levels and El Niño conditions are limiting vessel loading capacity and raising concerns over higher freight costs and schedule disruptions.

Global airfreight tonnage [fell 4% week over week](#) from August 3–9, with volumes from Asia Pacific down 3% and China's chargeable weight declining 5% amid Typhoon Dolphin disruptions. China-Europe airfreight was particularly weak, with volumes from mainland China down 8% year over year and Hong Kong down 29%, reflecting continued effects from the European Union's removal of the de minimis exemption.

REGIONAL FOCUS – AMERICAS

United States: The Port of Los Angeles handled 960,464 twenty-foot equivalent units (TEUs) in July, its [second-busiest July on record](#) and 7.5% above the port's five-year average. The strong volumes reflect an unusually early peak season as importers moved cargo ahead of tariff changes and other supply chain uncertainties, although the port expects some traditional peak-season cargo to have already arrived.

The U.S. Army Corps of Engineers [has approved a federal permit](#) for the Louisiana International Terminal, clearing a major regulatory hurdle for a new deepwater container facility on the Lower Mississippi River. The terminal will be designed to handle vessels exceeding 16,000 twenty-foot equivalent units (TEUs), with access to major rail and highway networks serving markets across more than 30 states.



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Mexico: The U.S. Federal Aviation Administration (FAA) is reviewing Mexico's aviation safety framework, raising questions about whether [a potential downgrade from Category I status](#) could limit Mexican airlines' ability to add U.S. routes, frequencies or larger aircraft. The assessment follows a July aviation agreement that resolved a dispute over access to Mexico City's airports, while Mexican air cargo volumes grew 5.5% year over year in the first five months of 2026, including an 11.3% increase at Felipe Ángeles International Airport.

REGIONAL FOCUS – ASIA-PACIFIC

China: Tighter customs treatment of low-value e-commerce shipments [is reshaping cross-border supply chains](#), with market firm Trade and Transport Group reporting [significant declines in e-commerce traffic](#) following the removal of the U.S. de minimis duty exemption. New European Union customs charges introduced in July are expected to further encourage local inventory and fulfillment, while shifting shipments from direct-to-consumer parcels toward consolidated freight and potentially from air to sea in major markets.

India: Maritime regulators have restored a cabotage waiver [allowing foreign-flag ocean carriers to transport containers between Indian ports](#), helping expand shipping capacity and improve the movement of cargo through the country's ports. The measure, initially introduced as a temporary response to supply chain disruptions from the Middle East conflict, had been scheduled to expire in October.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

Europe: Water levels on the Rhine River continue to remain in decline, sharply reducing barge capacity. With some mid-size vessels operating at only about 20% of capacity and larger container barges unable to navigate certain sections altogether, [surcharges from major carriers have begun to soar](#). The disruption is also increasing pressure on road and rail networks, with additional congestion surcharges taking effect August 20 as shippers prepare for a potential shift away from inland waterway transport.

Germany: A daylong strike by approximately 11,000 members of the trade union Ver.di [brought most container and cargo operations to a standstill](#) at six German seaports, including Hamburg, Bremerhaven and Wilhelmshaven, beginning August 17. The action is expected to cause some delays and backlogs, with another round of contract negotiations scheduled for August 24–25.