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GLOBAL APERTURE

Shipping traffic through the Strait of Hormuz [fell to just seven vessel transits](#) on September 10—well below the recent 10-day average of 15, according to preliminary ship-tracking data. The sharp decline continues to constrain a key trade route, with only limited tanker, bulk, and other commercial vessel movements reported through the strait. At the same time, Houthi forces [seized Yemen's port city of Mocha](#), increasing concerns around the Bab el-Mandeb Strait and Red Sea. Disruptions at both major maritime chokepoints could further constrain commercial shipping between Asia, the Middle East and Europe and increase the risk of delays and rerouting.

Air cargo volumes [grew 5.8% during the first seven months of 2026](#), according to the latest data from consulting firm Aevean, but demand is increasingly divided between major market segments. Data center-related imports into the U.S. rose 103% year over year through July, while air cargo volumes from China to the European Union fell 29% in July following new fees on low-value package imports.

REGIONAL FOCUS – AMERICAS

Mexico: Ports along Mexico's Pacific coast [are seeing strong growth](#), with container volumes at Manzanillo up 11.7% and Lázaro Cárdenas up 6% during January through July 2026 compared with the same period last year. Both ports are expanding infrastructure to handle higher volumes and larger vessels, but recent customs disruptions and ongoing road construction could create congestion and delays.

United States: Peak shipping season at major U.S. container ports is extending into September, with imports now [forecast to reach 2.31 million twenty-foot equivalent units](#) (TEUs), up 9.6% from a year earlier. Strong consumer demand, vessel delays and changing trade routes have kept import volumes elevated, although volumes are expected to ease beginning in October. At the Port of Long Beach, August cargo volumes [reached a record 919,992 TEUs](#), with imports up 3.6% year over year.

REGIONAL FOCUS – ASIA-PACIFIC

Congestion at Asian ports has reached 4.3 million twenty-foot equivalent units (TEU), [exceeding pandemic-era levels](#), as carriers adjust vessel routings and some services return to the Suez Canal. The shift is expected to release capacity into the Asia-Europe market, while continued congestion could affect vessel schedules and cargo flows through the region.

China: A plan [to strengthen China's national logistics network](#) by 2030, has been released by the country's National Development and Reform Commission and Ministry of Transport, with priorities including better connectivity between logistics hubs, stronger domestic and international corridors, and greater use of digital and green technologies. The plan calls for total social logistics costs to fall to 13.1% of gross domestic product by 2030 and identifies logistics infrastructure as one of six key national networks targeted for development during the 2026-2030 period.

Malaysia: Port operations at Tanjung Pelepas Port [were paused for several hours](#) after a cybersecurity incident shortly before midnight on September 9. The affected systems have since been restored and operations are progressively resuming, although some vessels may experience delays as the terminal works to normalize operations.

REGIONAL FOCUS – EUROPE, MIDDLE EAST & AFRICA

European Union: The European Union is moving ahead with [broad customs reforms](#), including a central EU Customs Data Hub, a new customs authority and simplified procedures for trusted traders. A €3 duty on low-value goods took effect July 1, while additional handling fees for e-commerce shipments are scheduled to begin November 1.

United Kingdom: Air cargo operations were disrupted on September 8 after a technical issue with the UK's NATS air traffic control system [contributed to around 2,000 flight cancellations](#) across September 8 and 9. Although the issue has been resolved, airports including Heathrow, Gatwick and East Midlands continue to experience ongoing recovery, with delays particularly affecting urgent, perishable and time-sensitive shipments.