



GLOBAL APERTURE

Across the globe, climate volatility and labor crises raise further alarm at a time when the headaches of peak season usually wane. Contrasting with a November 9 report by NASA's Jet Propulsion Laboratory that carbon dioxide emissions fell some 5.4% year-over-year in 2020, a study by Nanyang Technological University, Singapore found that overall pollutant emissions have increased at major seaports throughout the course of the Covid-19 pandemic. Such findings set a backdrop for end-of-year developments by state and industry toward environmental stability: the EU and ASEAN announce their partnership in the Green Team Europe Initiative; several airlines have formalized code-sharing agreements to expand service support as passenger travel picks up pace; and the world's first electric autonomous cargo ship disembarks from Norway on November 26 to begin two years of working trials.

Air cargo market trends shift once again in response to unforgiving congestion at seaports and lagging recovery in the air transport workforce, with stalled or slashed flights expected through November-end and December holidays due to understaffed ground handling providers, pilot shortages, and backlogged cargo terminals.

REGIONAL FOCUS

AMERICAS

Capacity
Rates
Demand



Rates



With federal aid, additional container depots, and state legislation passed to increase truck load capacity, U.S. West Coast idle container counts have decreased by as much as 25% over the past week. Excess Dwell fees for import containers are withheld once more from the ports of Long Beach and Los Angeles—officials say the new enforcement date is November 29. In the U.S. Southeast, airlines are restarting international services to Latin America and Europe to sate traveler demand and release some tension built up from Savannah Port's cargo backlog.

Oversaturation has increased vessel loading times at Port Manzanillo, taking up to 18 hours in some cases. In Mexico City, over 11 demonstrations will take place across several of the capital's districts on November 24, affecting major downtown roads.

Rail service to Vancouver Port is slowly returning after heavy storms flooded much of the Pacific Northwest last week; Canadian Pacific restarted two trains, and Canadian National announced its mainline will restart on November 25. At least three more storms are forecast to arrive through the week, and a potential trucking strike may keep cargo flow cramped up in British Columbia. In response, Air Canada has increased cargo capacity between Vancouver and other major Canadian cities through November. Port Halifax is also expected to receive torrential multi-day rains later this week.

ASIA-PACIFIC

Rates
Demand



Capacity

Capacity
Demand



Congestion in Asia-Pacific ports has declined significantly in the final weeks of November save a handful of exceptions, including China's Tianjin and Dalian Ports. In the Philippines, Manila Port was also reportedly suffering from congestion as trucker unions held a 'rest day' on



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APERTURE & FOCUS

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November 24 in protest of a new “no permit, no service” policy enforced nationwide by the port authority. A truck driver union election held November 21 delayed export cargo movement from Chittagong Port for eight hours, but another indefinite strike scheduled by the Bangladesh Lighterage Workers Union (BLWU) was postponed for seven days on November 24, and operations at the port are currently normal.

Vietnam’s state-run ocean carrier VIMC opens a new cargo route connecting Hai Phong Port with Port Klang, Malaysia and Kolkata, India on November 25.

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to an unexpected early freeze across the Northern Sea Route—large swathes of the Laptev and Siberian seas are now covered in ice, and Russia has dispatched icebreaker vessels to assist.

EUROPE, MIDDLE EAST & AFRICA



As Asia-America transpacific routes winnow down air capacity, Turkey’s MNG Airlines starts a thrice-weekly freighter service between Cologne, Germany and New York, U.S. to expand its near-daily Istanbul-Cologne scheduled flights. Unfortunately, several major ports in the European region are still battling congestion including Le Havre, Felixstowe, and Liverpool. Intra-Europe ferry operators are now introducing more capacity in anticipation of the new 2022 UK customs regime, particularly as ro-ro demand between Dover and Calais heats up.

The Poland-Belarus migrant crisis has started to suspend cross-border traffic between the two countries, worrying some that the conflict may also drag down transcontinental Asia-Europe rail networks.

A feasibility study will be conducted on the efficacy of several measures proposed by France, Monaco, Italy, and Spain to reduce vessel collisions with whales in the Mediterranean Sea—including the restriction of certain corridors and enforced speed limits.

At least 18 cargo ships have become trapped in ice due



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