

AUG 11, 2025



INDUSTRY UPDATES

FREIGHT FORWARDING

BIMCO: US PORT VOLUMES GROW 1.7% IN H1 2025

The EIA reports container throughput across nine major U.S. ports rose 1.7% year-on-year to 16.9 million TEU in H1 2025. Imports led growth, up 4.3%, driven by early-year preload strategies, while exports lagged, falling 4.2%. Spot freight rates (SCFI) have since dropped over 60% as tariff uncertainty cooled demand

CONTAINER MARKET REMAINS RESILIENT IN H1

The Container Trade Statistics (CTS) show global container trade hit 93.5 million TEU (+4.5% YoY) in H1 2025. June volumes—16.1 million TEU—were slightly below May's record but signal strong sustained demand. Import growth was especially notable in Sub-Saharan Africa (+14%) and Europe, while exports from North America dropped 3%.

NCFI SEES SHARP DROP IN JULY FREIGHT INDEX

The Ningbo Containerized Freight Index (NCFI) recorded a sharp decline in July, falling 20.5% month-on-month and plunging 56.7% year-on-year. The drop reflects weaker demand out of Asia following the post-tariff-pause shipping surge earlier in the year. Rate pressure was particularly heavy on Asia-Europe and Transpacific lanes, where vessel capacity remained ample and cargo volumes softened. Analysts note that the correction could offer cost relief to shippers but may squeeze carrier margins if sustained into the peak season.

HIGHLIGHT

**US PORT
VOLUMES UP
1.7% IN H1**

**GLOBAL
CONTAINER
TRADE HOLDS
STRONG**

**NCFI FREIGHT
RATES DROP
SHARPLY**

**LONG BEACH
SETS CARGO
RECORD**

**SPAIN'S FIRST
BIO-LNG
BUNKERING**

**QUICK
TAKEAWAYS**

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PORT OF LONG BEACH RECORDS BUSIEST JULY EVER

The Port of Long Beach set a new all-time cargo volume record in July, handling more TEUs in a single month than at any point in its history. The surge was driven by importers accelerating shipments during earlier U.S. tariff pauses, ensuring inventory security ahead of potential trade policy changes. Strong consumer demand for retail goods and electronics also contributed to the record, with Asia–U.S. West Coast lanes seeing particularly high activity. Port officials noted that infrastructure investments and expanded rail capacity helped manage the influx without major congestion, reinforcing Long Beach’s position as a critical U.S. gateway for trans-Pacific trade.

AXPO COMPLETES SPAIN’S FIRST SHIP-TO-SHIP BIO-LNG BUNKERING

Energy firm Axpo has successfully carried out Spain’s first ship-to-ship bio-LNG bunkering operation in the container shipping sector, transferring over 4,000 m³ of ISCC-certified bio-LNG between vessels. The operation took place at the Port of Barcelona and marks a significant step toward low-carbon fuel adoption in European maritime hubs. Bio-LNG, produced from renewable sources, can reduce lifecycle greenhouse gas emissions by up to 80–90% compared with conventional marine fuels. This milestone highlights the growing role of alternative fuels and bunkering infrastructure in helping the shipping industry meet IMO decarbonization targets while maintaining operational efficiency.

QUICK TAKEAWAYS

US Port Volumes	: Import-led gains offer relief, but export weakness and rate drops reflect tariff-driven volatility.
Global Trade Resilience	: Strong TEU growth globally reinforces positive momentum beyond regional markets.
Freight Index Decline	: Sharp rate correction signals improved shipping affordability—but adds pressure on carriers.
Long Beach Surge	: U.S. West Coast remains a vital entry point—high July volumes reaffirm trade strength.
Bio-LNG Bunkering	: Early adoption of renewable fuels sets a benchmark for sustainable port operations.

Source: Data drawn from publicly available industry news