



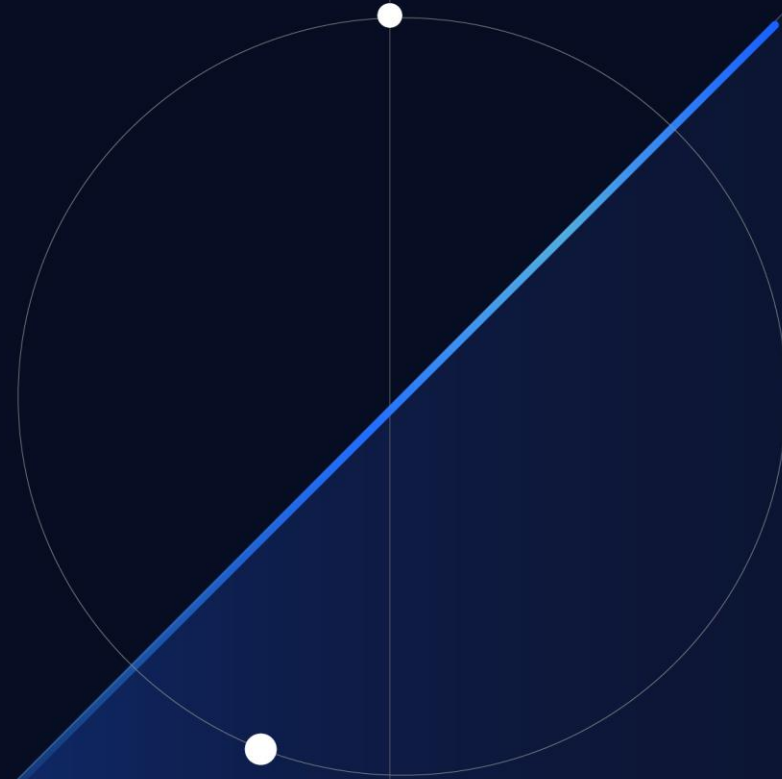
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June/July 2025 | Container Shipping Trends

**Growing tensions in Middle East
that disrupt supply chains &**

Transpacific rollercoaster ride

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27.06.25**

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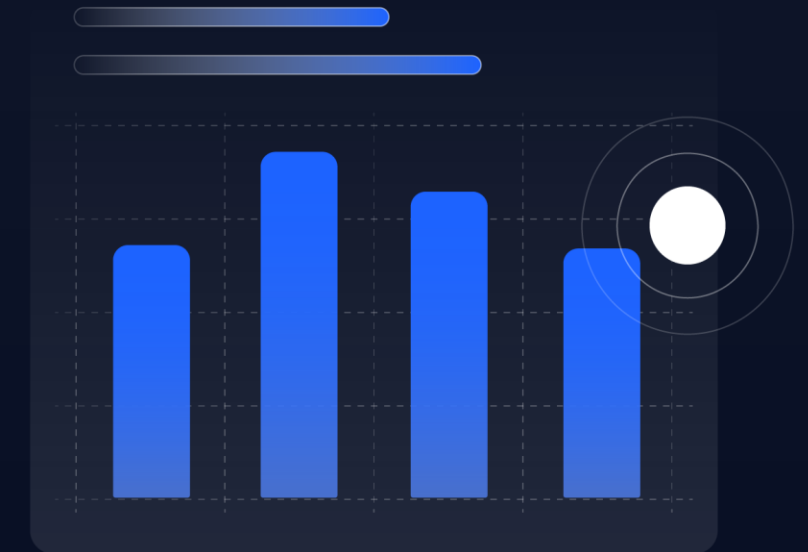
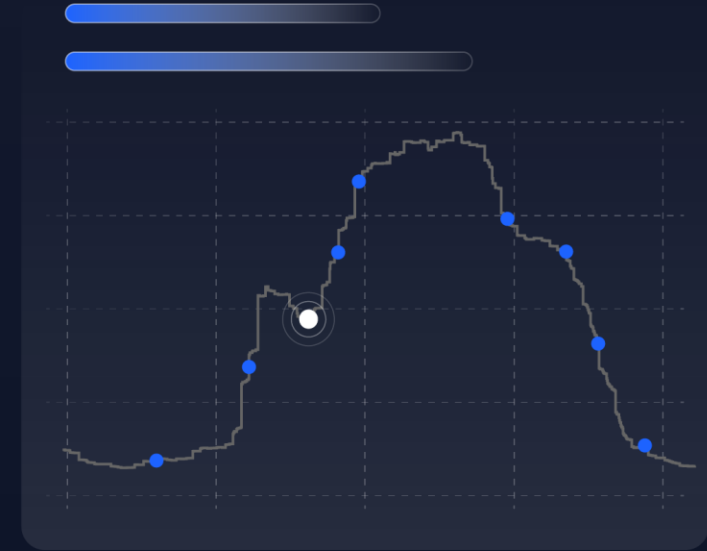
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Ocean Freight Rates Explained

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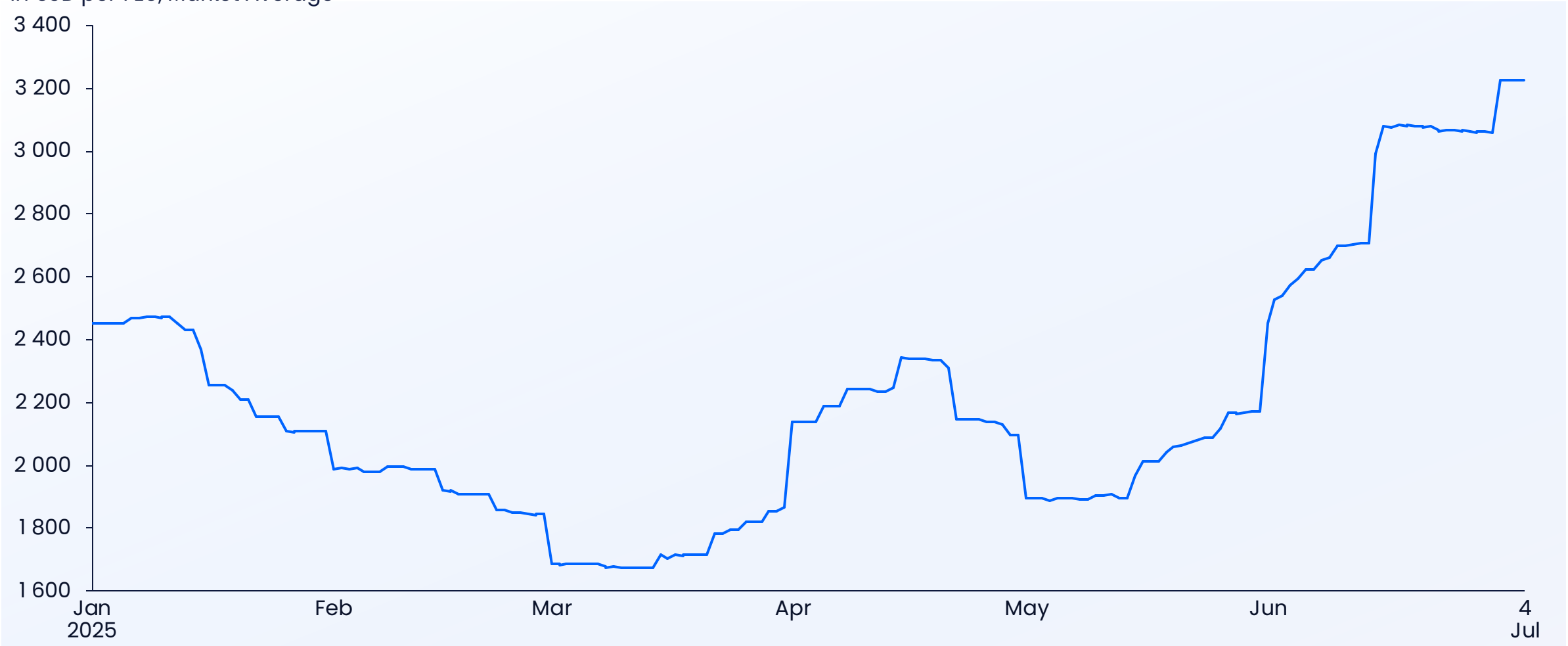
Monthly Specials!



Spot rate rises due to tensions in the Middle East

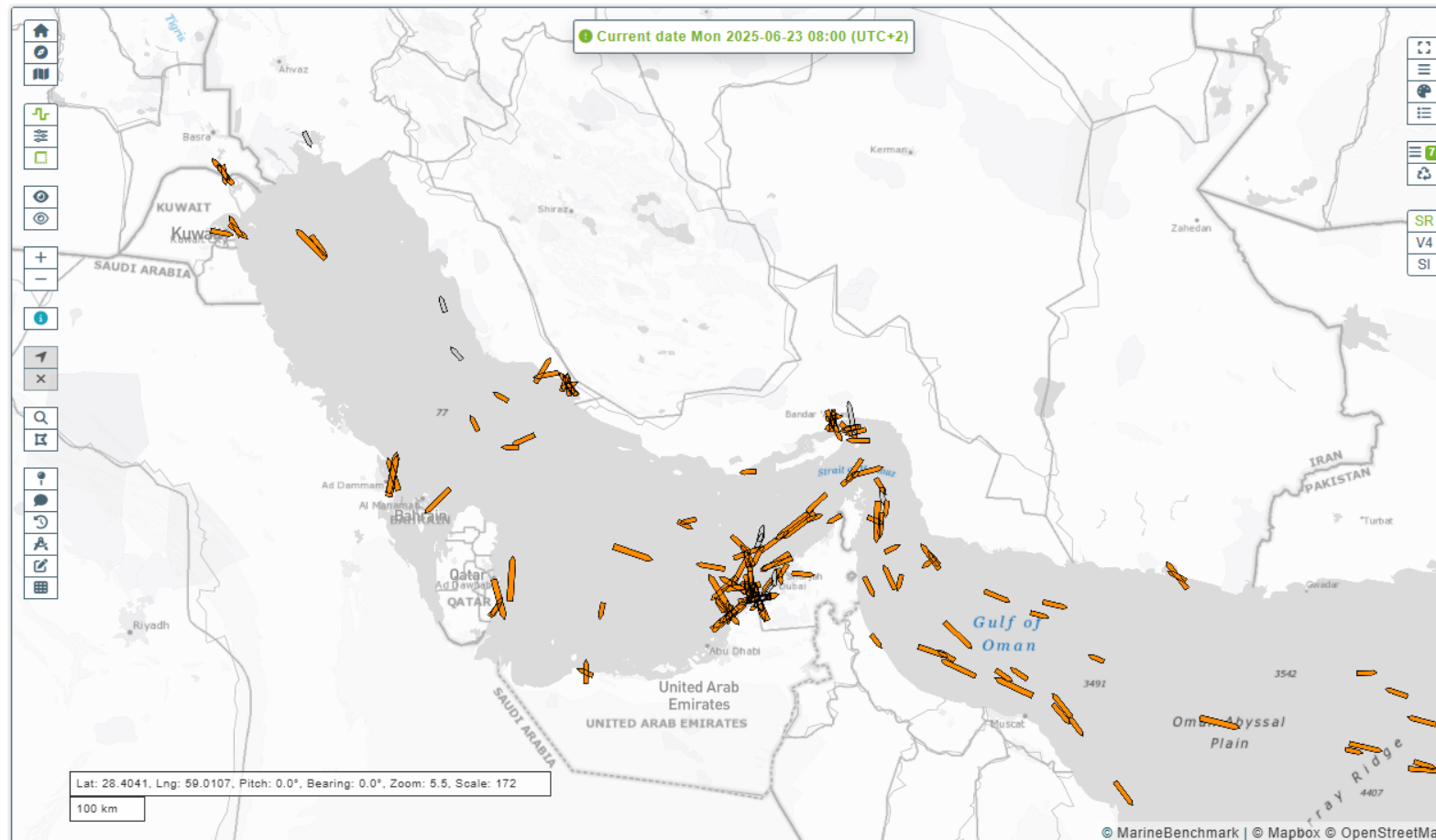
Spot Rates: China Main – Persian Gulf / Gulf of Oman

In USD per FEU, Market Average



5 facts about the Strait of Hormuz and Middle East

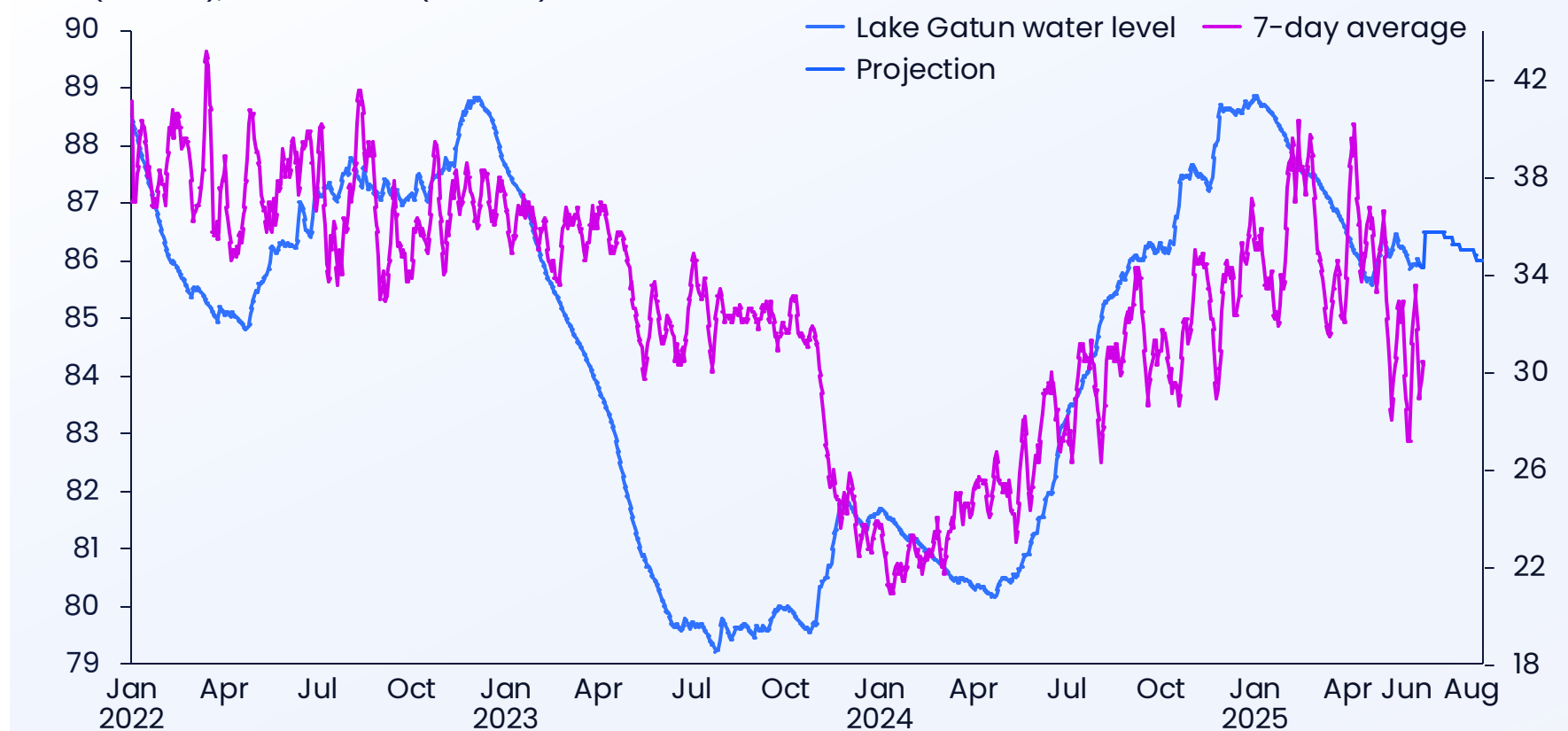
- 150 ships transiting in & out, around 20% of those being containerships
- More than 40% liquid energy carriers
- Far East – Middle East: 4,424,618 TEU in 2024. Total inbound in 2024: 9m TEUs
- Top 4 ports: 1. Dubai, 2. Jeddah, 3. Salalah, 4. Abu Dhabi
- **In chart:** All containerships in the area on 23rd June 2025.



Panama Canal: Container transits unaffected by drop

Lake Gatun Water levels and Total Transits

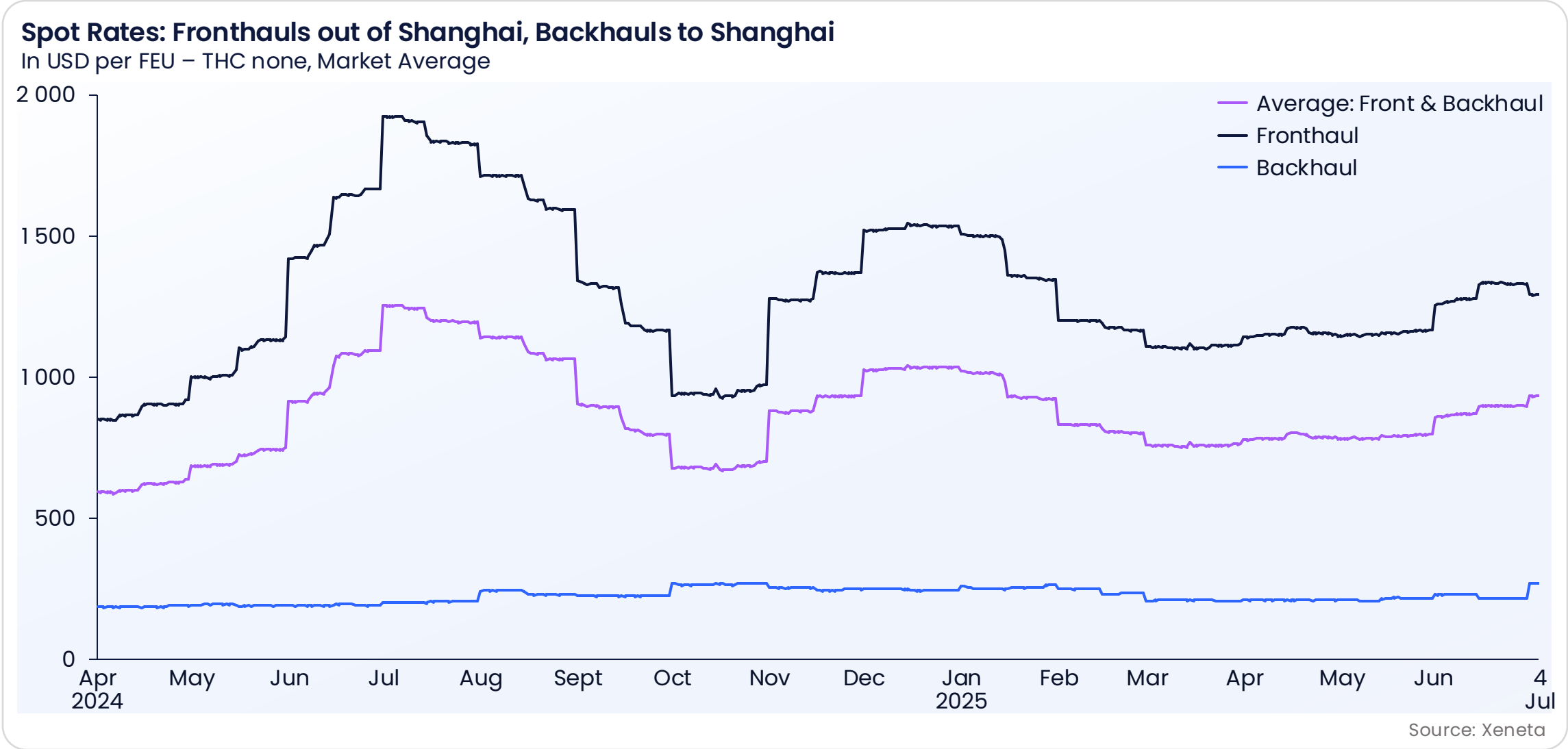
In feet (LH-axis), Transit in no. (RH-axis)



Source: Xeneta

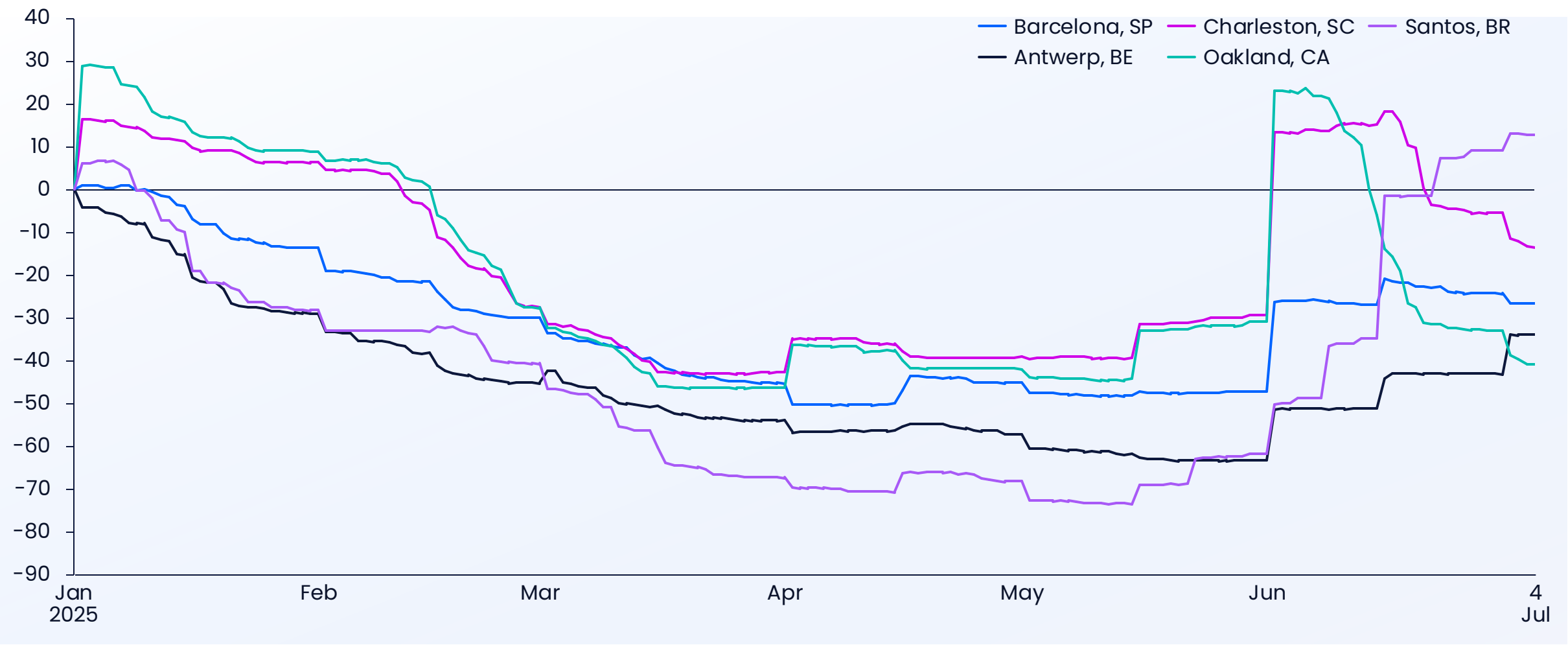
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Spot rate Shanghai – Jebel Ali and Nhava Sheva jumps



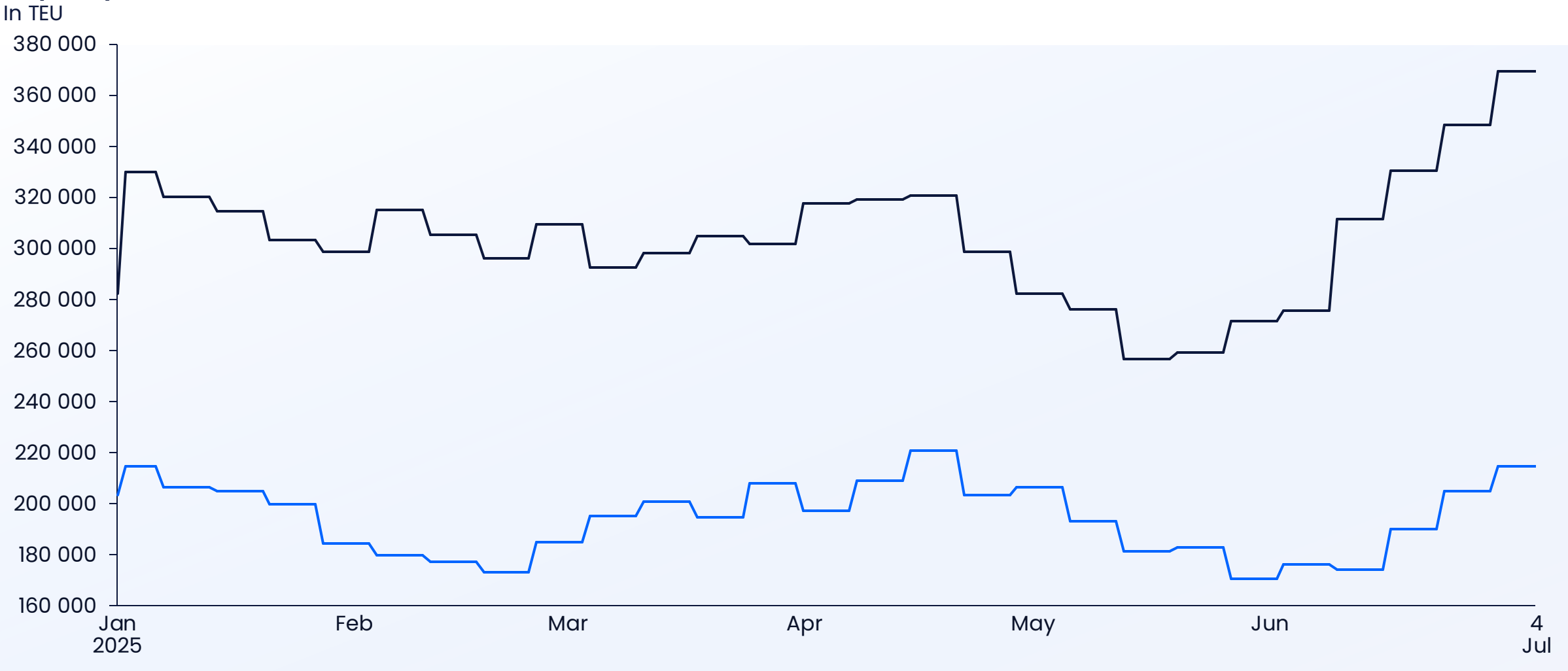
Spot rates: a split market as North America falls back

Fronthaul Spot Rates out of Shanghai
Changes in %, since 1 January, Market Average



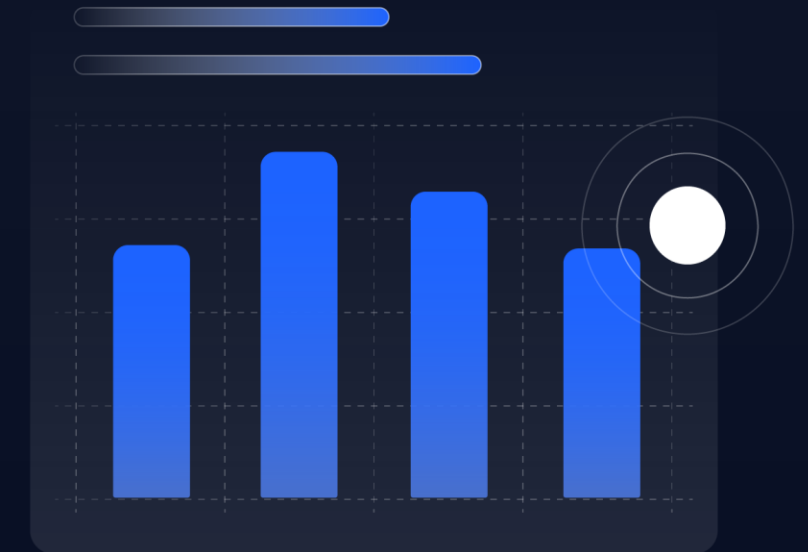
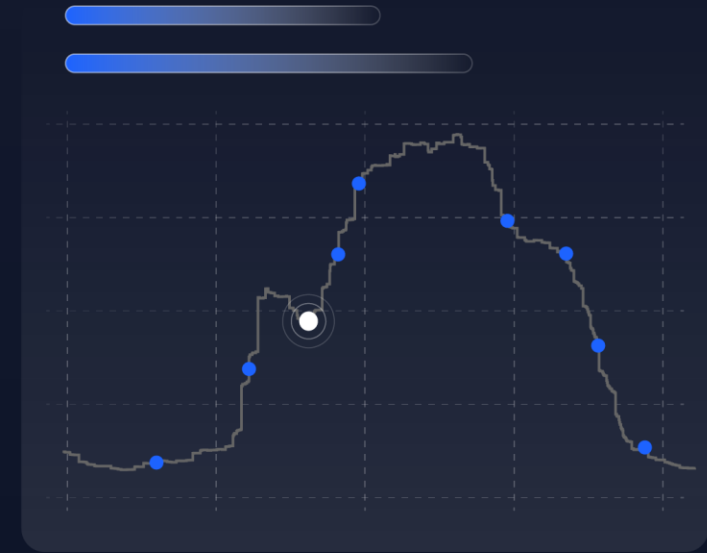
Capacity bounces back – asymmetrically since mid-May

Capacity Offered out of Far East – US West Coast (black line) and US East Coast (blue line)



Fronthaul vs. Backhaul

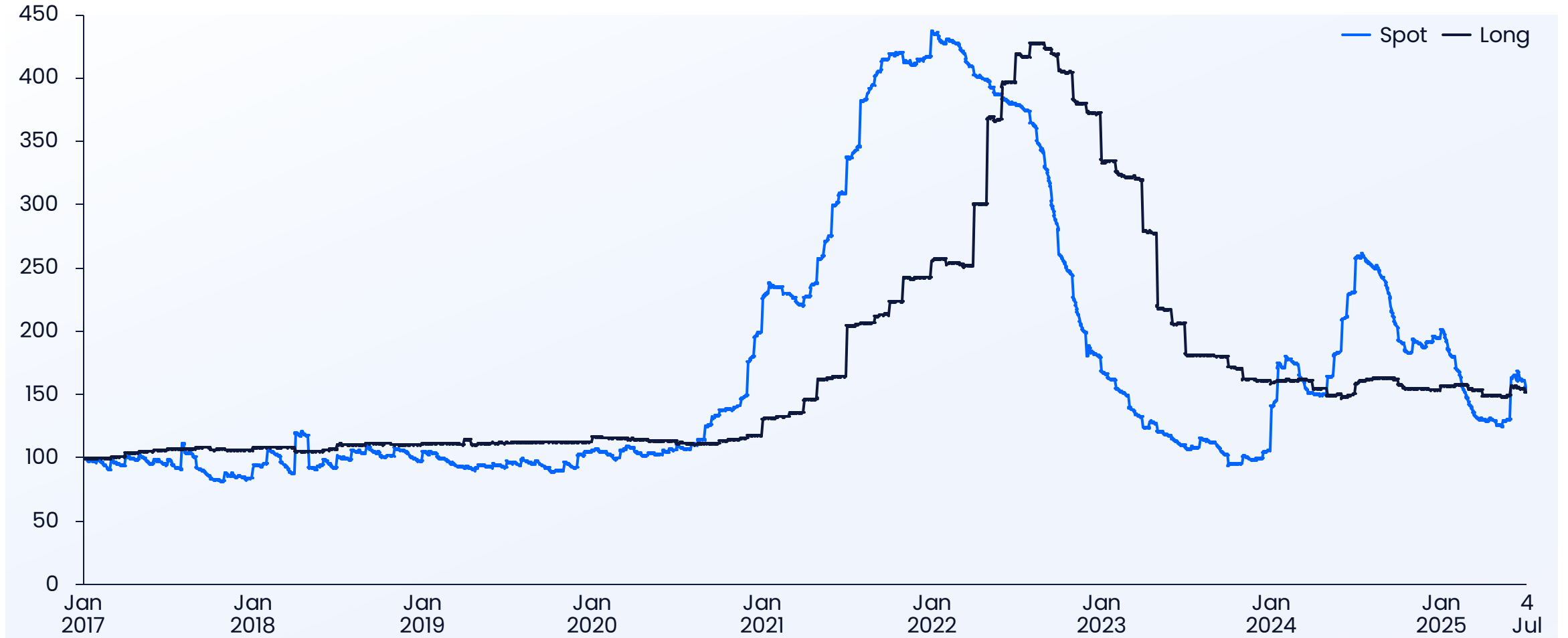
Current Freight Rate Trends
- short and long term



Development of global spot and long-term rates

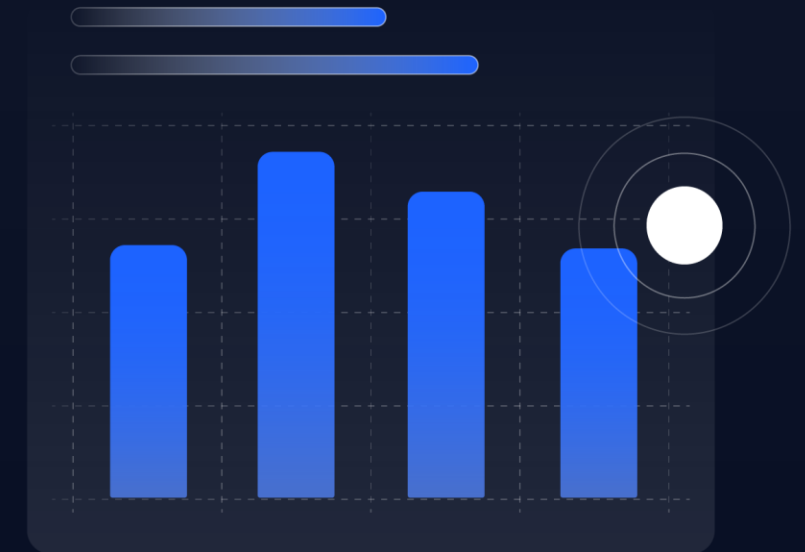
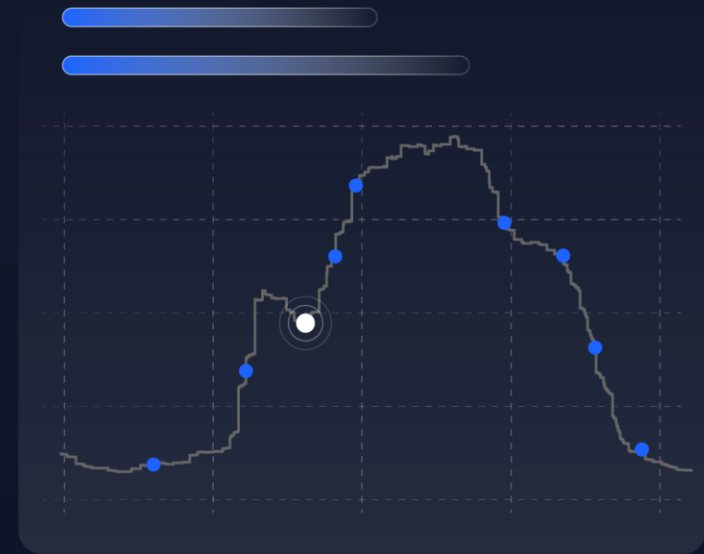
Global Average Rates

Index 100 = 2017



Supply Chain Heat Maps

Xeneta Shipping Index by Compass (XSI-C)



XSI®-C: Far East to South America EC & North Europe keeps rising

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Xeneta Shipping Index by Compass (The XSI-C)

Origin	Destination	Week 17 ending 25-Apr	Week 18 2-May	Week 19 9-May	Week 20 16-May	Week 21 23-May	Week 22 30-May	Week 23 6-Jun	Week 24 13-Jun	Week 25 20-Jun	Week 26 27-Jun	Week 27 3-Jul ending
		25-Apr	2-May	9-May	16-May	23-May	30-May	6-Jun	13-Jun	20-Jun	27-Jun	3-Jul
Far East	to US West Coast	-3.1%	-2.6%	-7.0%	0.4%	12.4%	4.5%	56.2%	12.5%	-10.7%	-28.6%	-15.0%
Far East	to North Europe	0.4%	-4.8%	-7.7%	-4.1%	-4.0%	-1.9%	25.9%	3.3%	16.1%	1.9%	13.5%
Far East	to South America East Coast	5.8%	-4.8%	-10.6%	3.3%	12.0%	13.9%	25.0%	26.1%	40.7%	10.3%	11.8%
North Europe	to Far East	1.3%	-7.4%	-10.0%	10.1%	-0.6%	0.1%	13.1%	9.9%	3.3%	0.5%	-14.2%
North Europe	to South America East Coast	-2.5%	2.1%	-2.2%	-8.3%	0.6%	0.0%	13.6%	0.4%	-1.6%	0.4%	-7.5%
North Europe	to US East Coast	0.2%	-2.2%	-2.6%	0.6%	0.6%	-1.4%	2.7%	0.3%	-0.7%	0.0%	-4.8%
US East Coast	to North Europe	2.6%	2.4%	2.6%	1.0%	1.7%	1.4%	-0.4%	-0.1%	3.2%	-1.4%	-7.1%
US West Coast	to Far East	2.3%	-0.9%	-0.6%	-0.3%	1.9%	0.9%	-0.1%	0.2%	-0.1%	0.3%	-2.0%

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Note:

Weekly average

Rates falling by more than 0.4% are GREEN

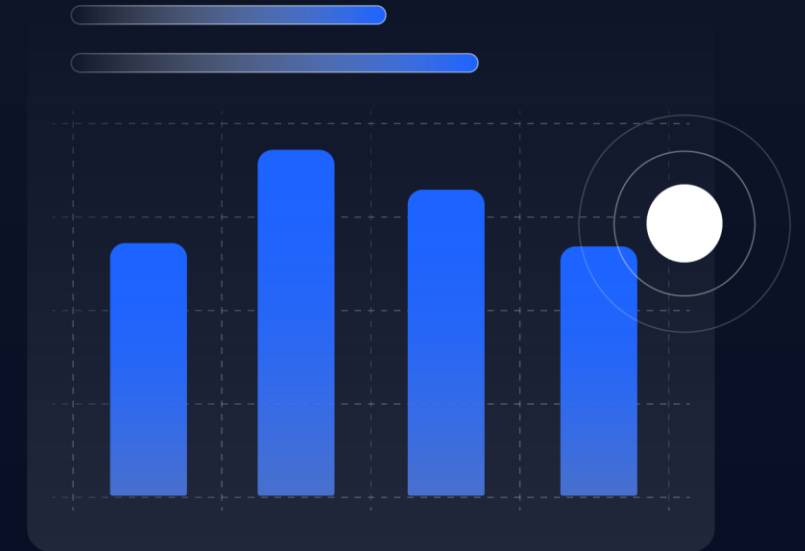
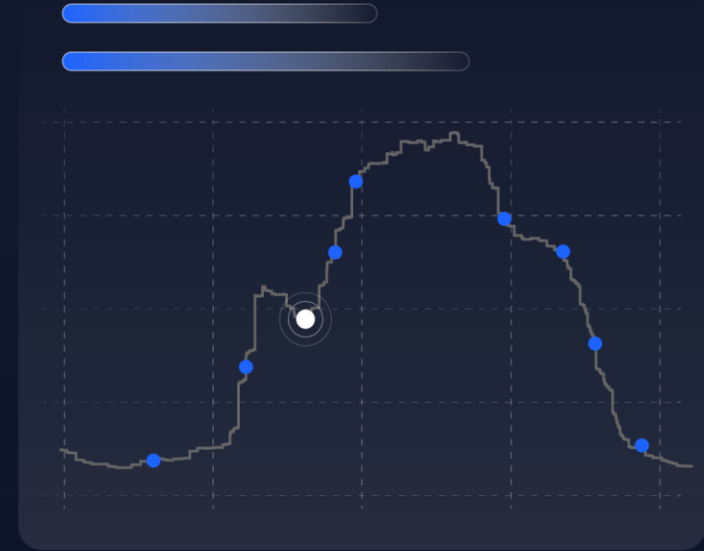
Rates going down OR up by less than or equal to 0.4% are YELLOW

Rates climbing by more than 0.4% are RED



Bunker Fuel Prices

Main Ports in Asia and Europe



Bunker fuel market trends: Spreads are rising as HSFO decline

Singapore

Bunker Fuel Prices: USD per Ton

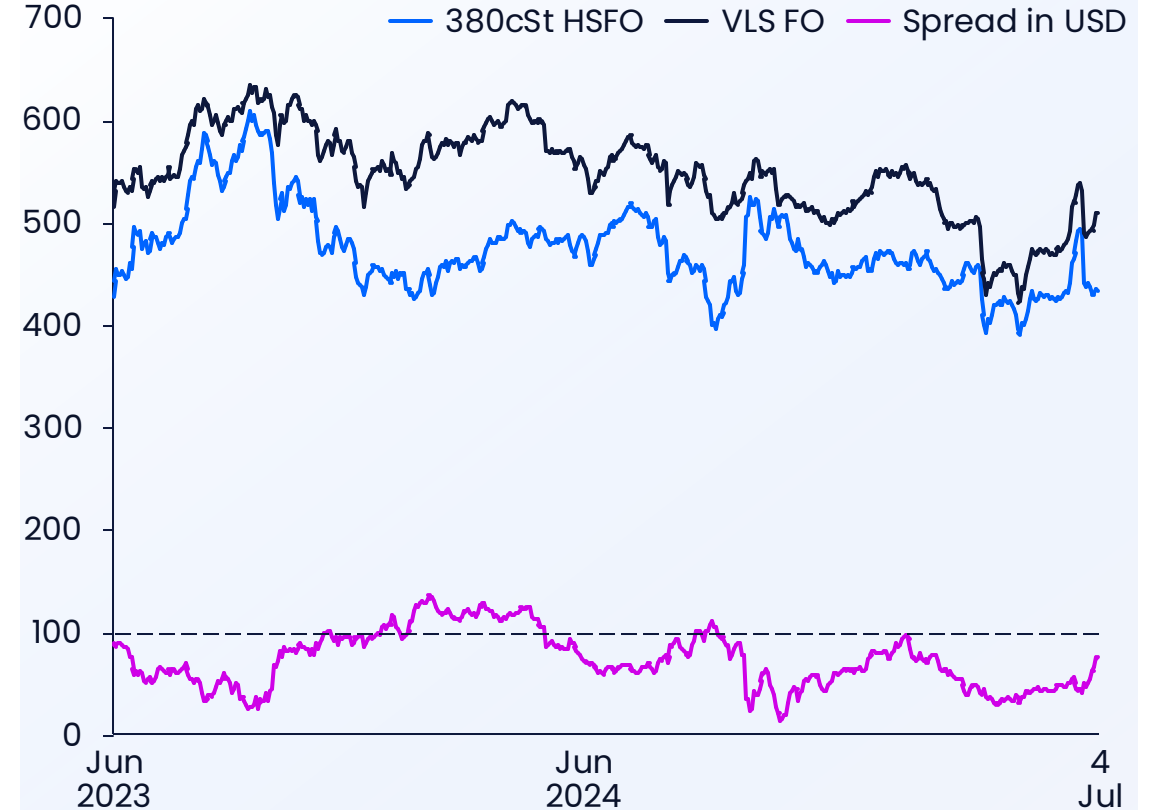


Source: Xeneta, MABUX

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Rotterdam

Bunker Fuel Prices: USD per Ton

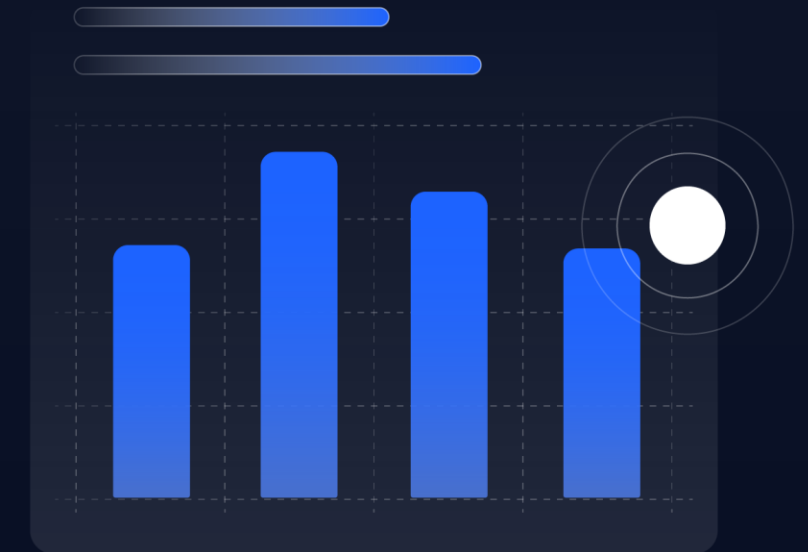
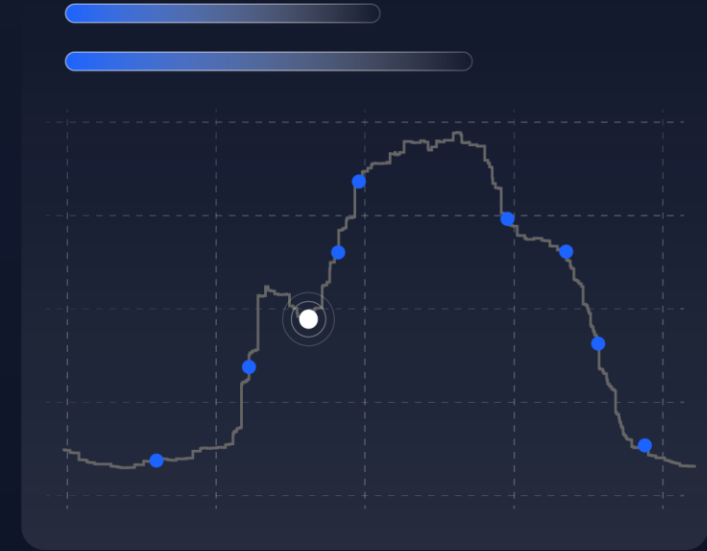


Source: Xeneta, MABUX

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What's being shipped?

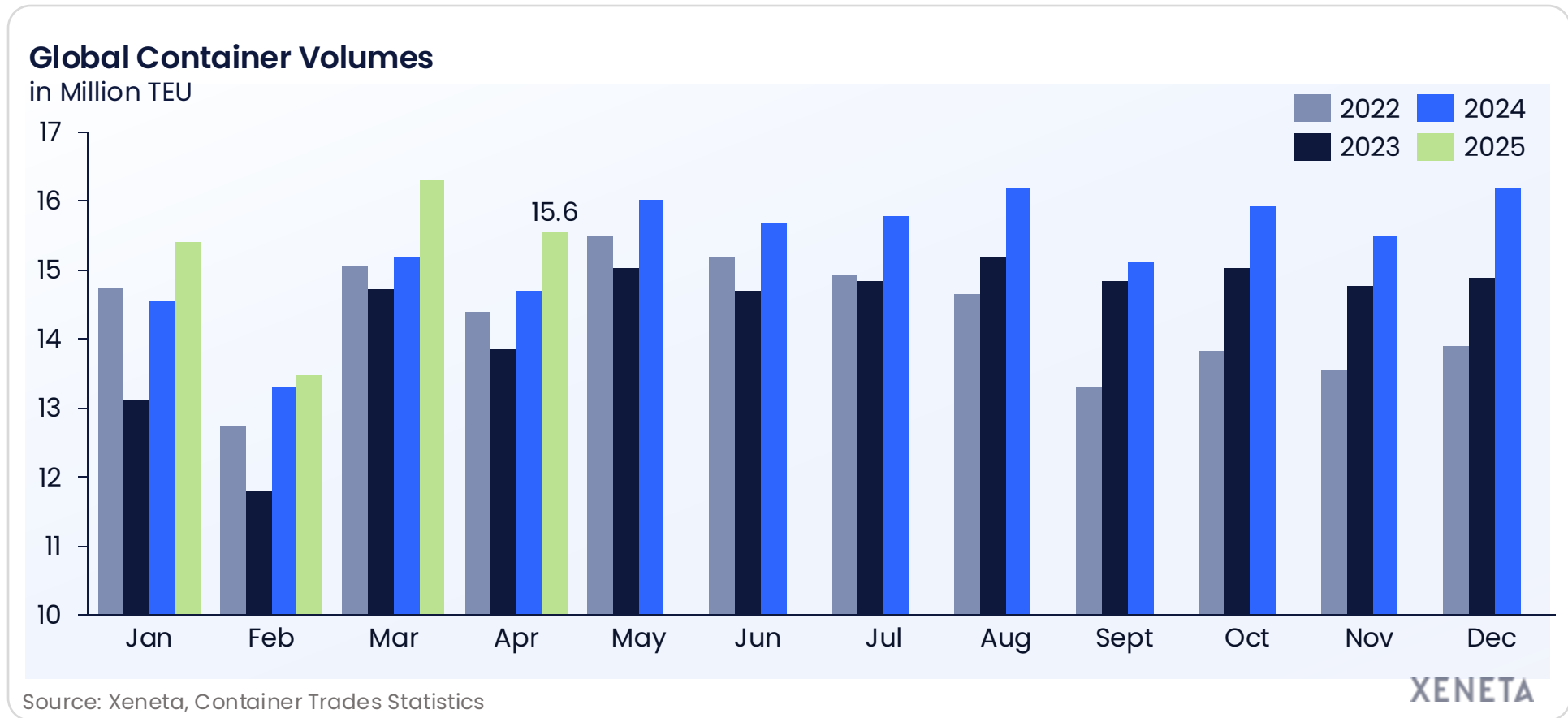
Current Demand Trends



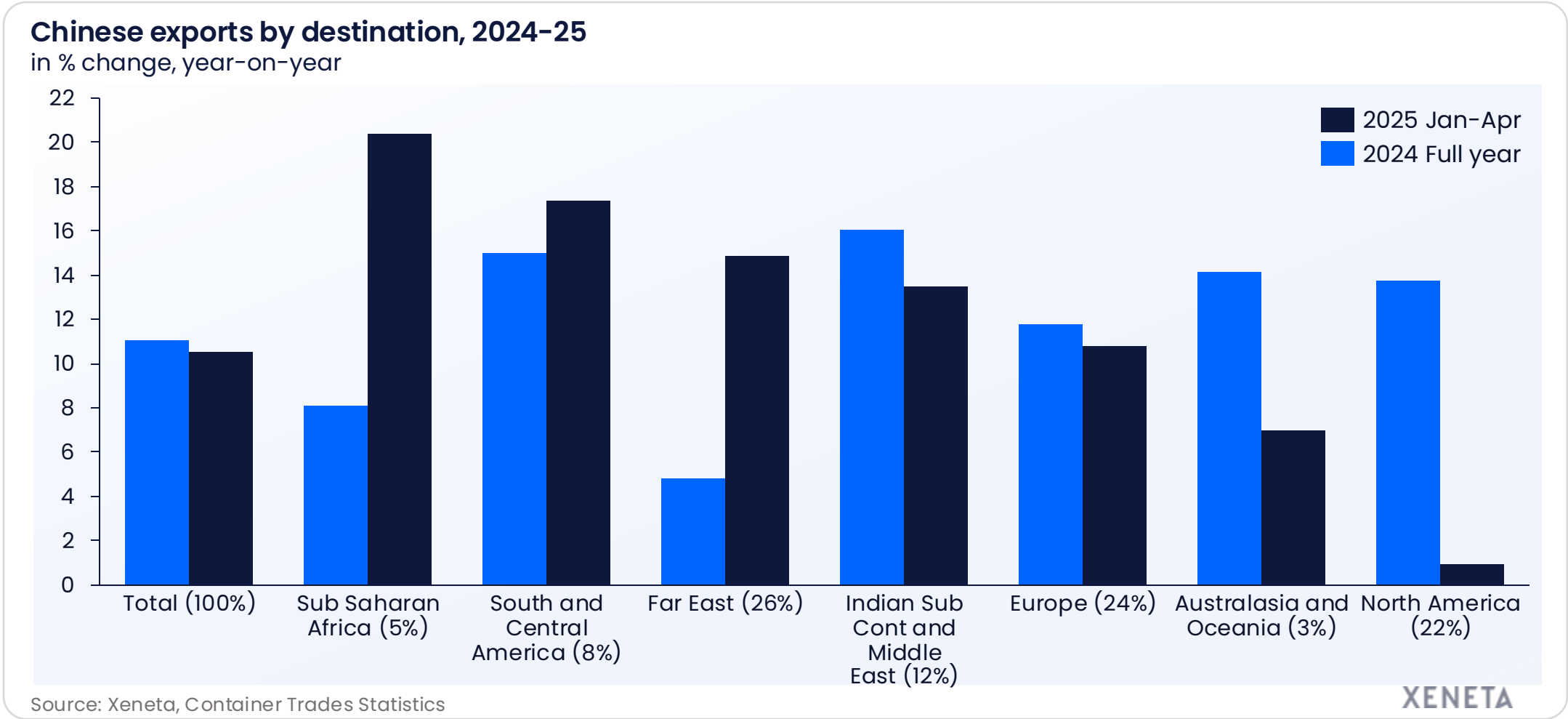
April 2025: Highest April on record

Takeaways

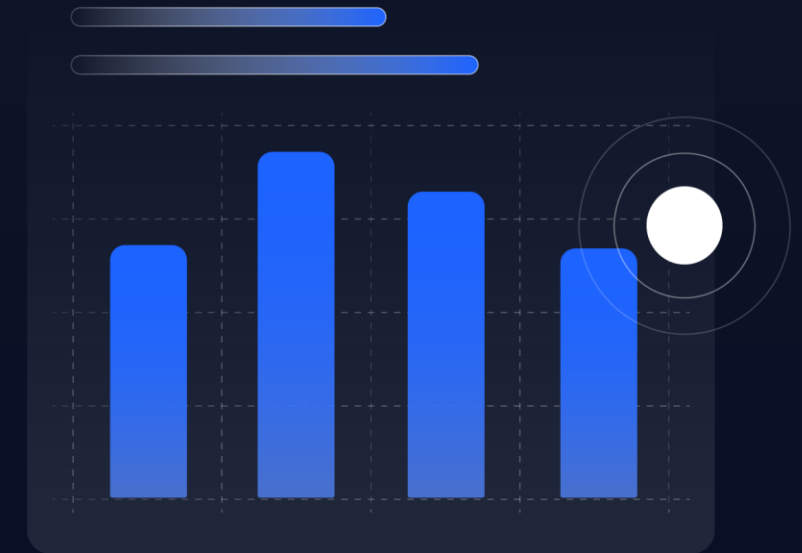
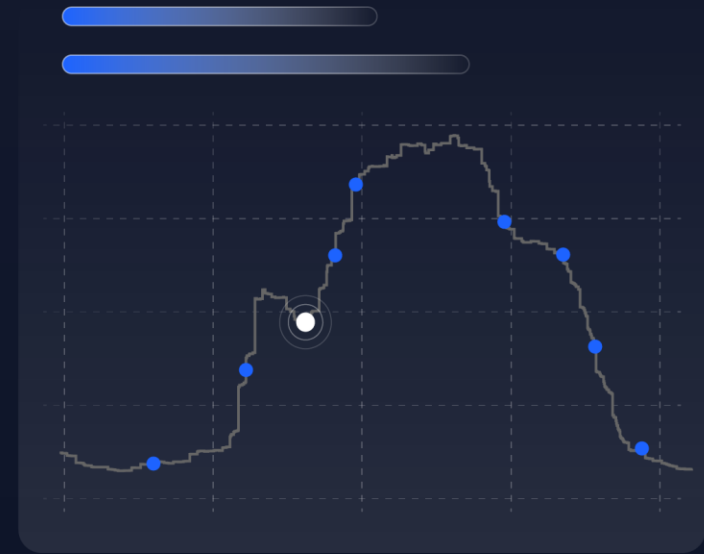
- April 2025 volume increased 5.8% compared to April 2024



Chinese exports growing most in Sub Saharan Africa



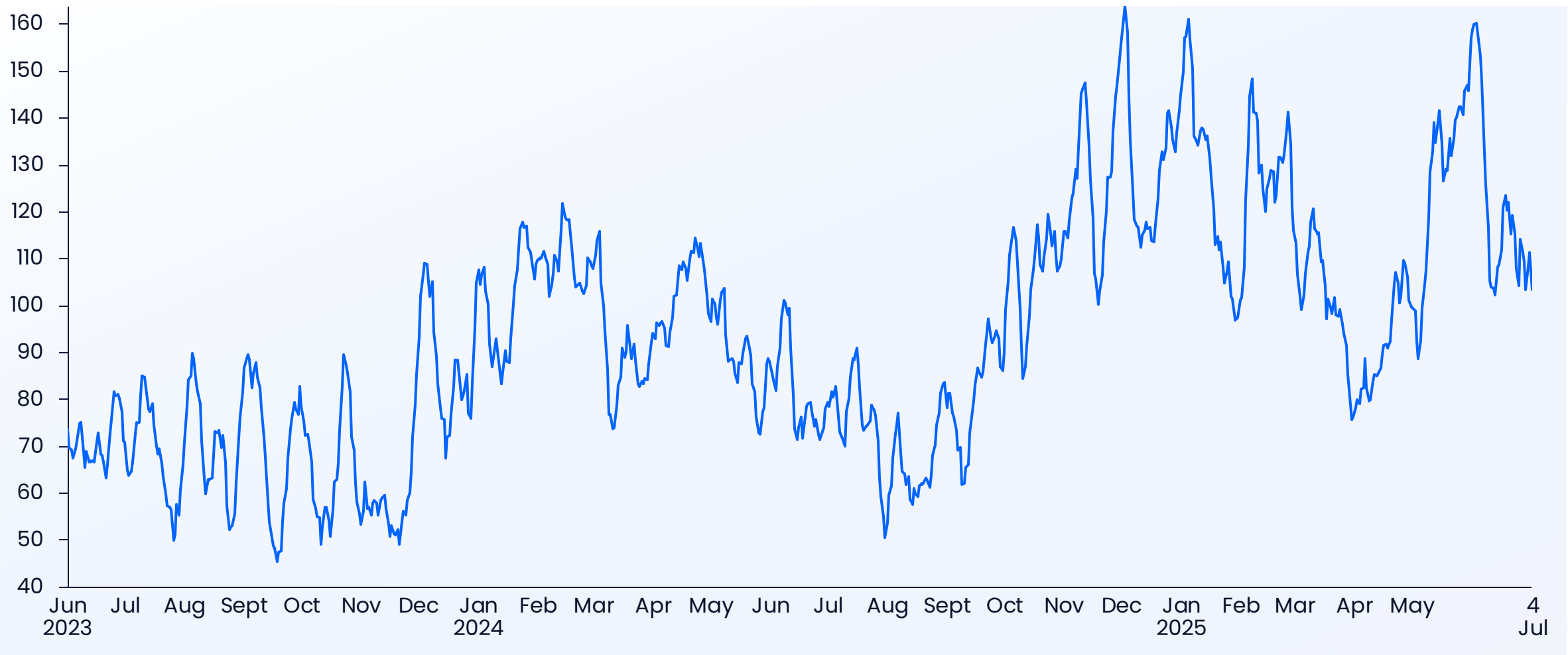
Where's the congestion?



Congestion bouncing back in Colombo

Port Congestion – Colombo

in Thousand TEU

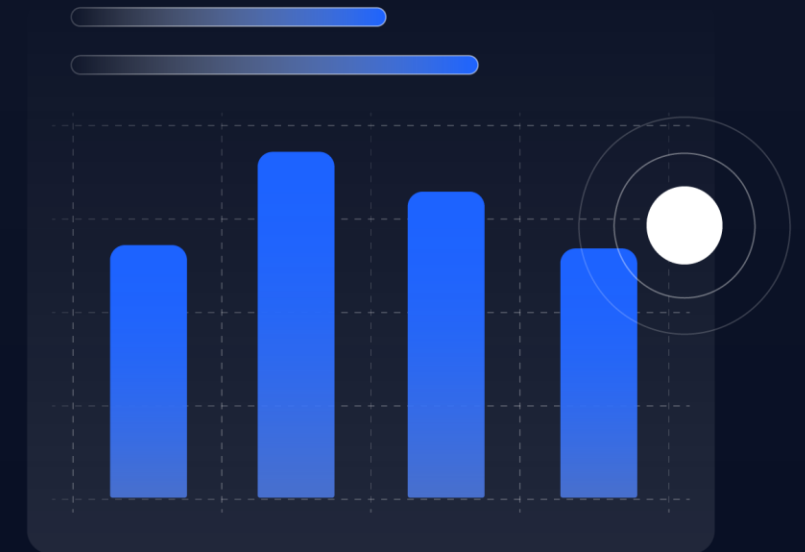
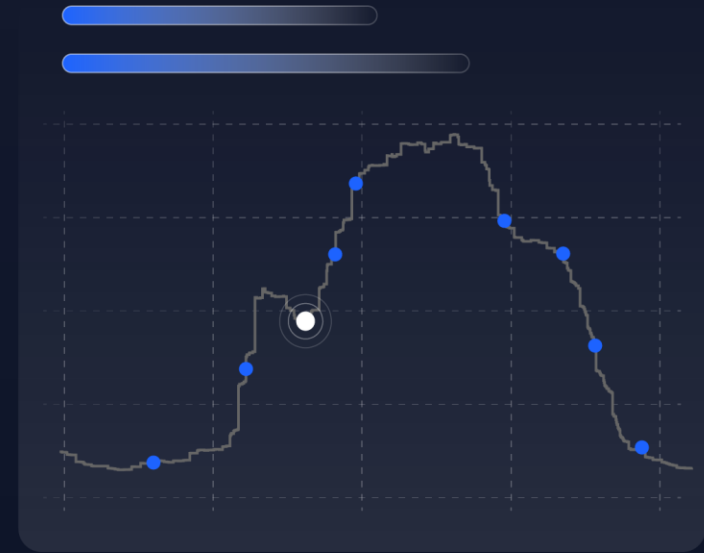


Congestion: sharp decline in Port Klang – Gemini take its toll



Where's the economy heading?

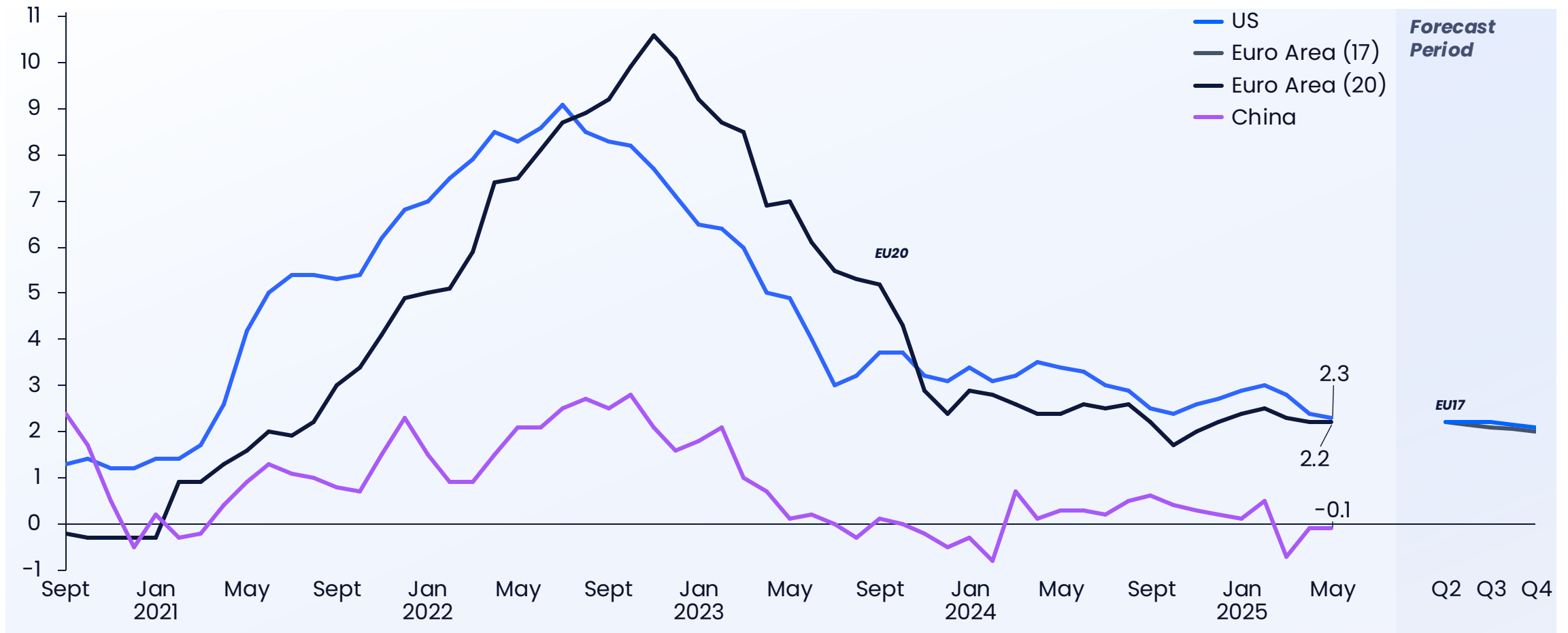
In the East and in the West



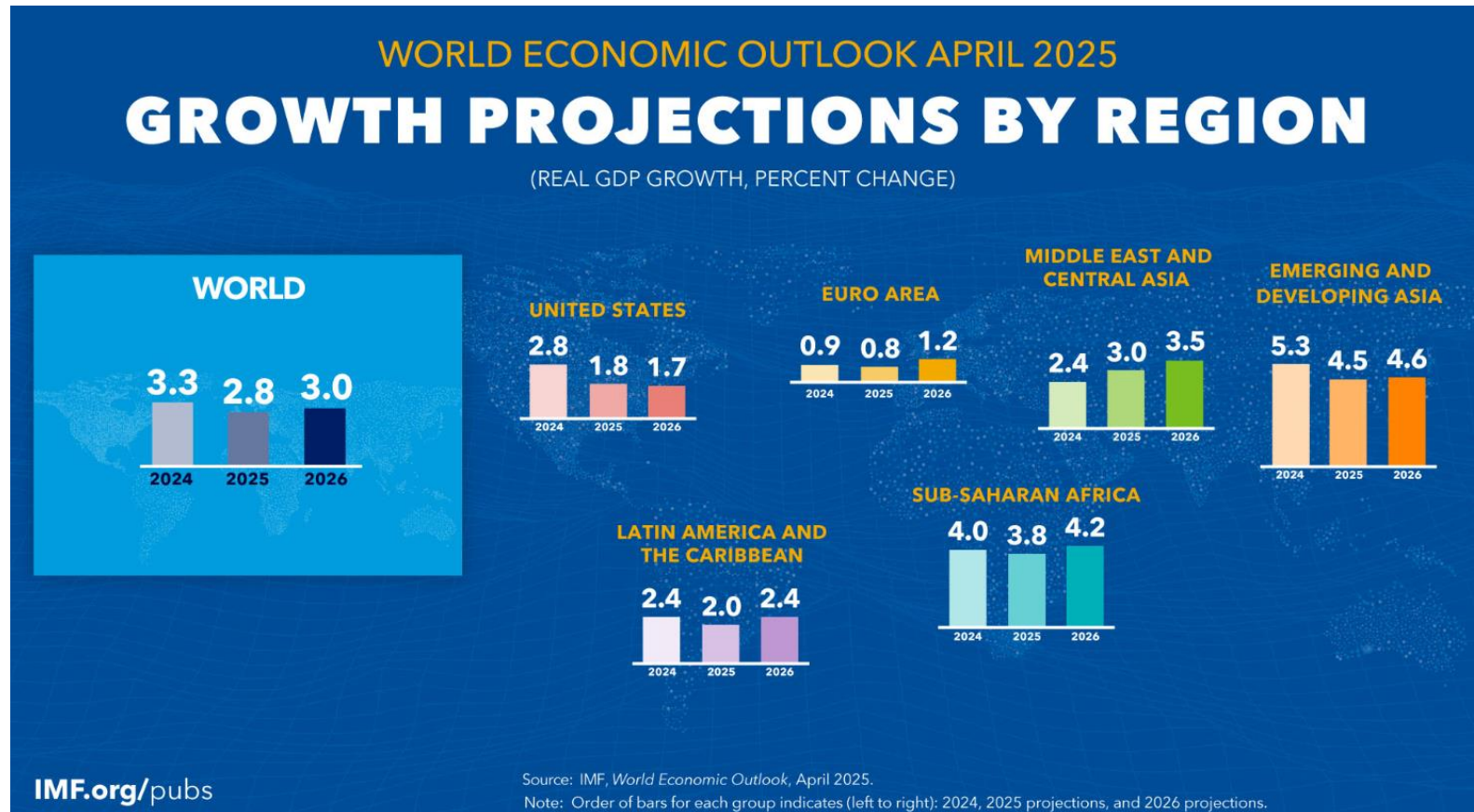
Inflation easing in Euro Area and US – Deflation in China

Inflation and Forecast – China, Euro Area, US

Annual Growth in %



Growth projection for Global Economy decreasing



- **Broader update on macro-economics provided in XODD report**
- Compared to projections in Jan '25: 'World' decreases 0.5 percentage points. United States decreases 0.9.
- Tariffs cause major negative shock to growth, outlook, and consumer confidence
- High policy uncertainty is expected to significantly impact economic activity

XENETA SUMMIT 25

OCTOBER 9-11 2025,
Barcelona

Shippers
Freight Forwarders

Shipping Lines
Airlines



Freight Debate – Podcast

New Episode live on YouTube: Past, Present and Future of Freight



Key Insights:

- Phil Hennessey and Patrik Berglund, (co-founder and CEO of Xeneta) dive into the evolution of the freight and shipping industry. They candidly discuss the origins of Xeneta, highlighting the challenges of bringing transparency to the complex and often opaque ocean freight market.
- From the early days—built on spreadsheets and cold calls—to the hurdles of data collection and gaining early adopters, Patrik shares the perseverance and lessons that shaped Xeneta's journey.
- The conversation touches on major industry shifts caused by recent global disruptions, the increasing complexity for shippers and carriers, and looks forward to future changes, such as index-linked contracts and advances in predictive analytics.

[Watch now](#)

LIVE WEBINAR

Gemini, the Red Sea & the Fine Print: What's Really Driving Ocean Freight in 2025

24th June 2025

Key Insights:

- *What carriers promised vs. what actually happened*
- *How Red Sea disruptions, tariffs, and shifting alliances are reshaping supply chains*
- *Where hidden risks (and costs) are hiding in today's freight contracts*
- *What leading logistics teams are doing differently to protect their operations*

[Watch now](#)



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Thank you!

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