MARKET INSIGHTS

Ports face increased congestion with 40% of ships delayed

In June 2025, global port congestion has intensified, with a particularly significant impact in Northern Asia, Northern Europe, and certain Mediterranean ports. The analyzed data indicates a sustained increase in the number of vessels and TEUs affected, now accounting for approximately 9% of global capacity. At the same time, key ports such as Hamburg, Antwerp, and Tanger Med have reported year-on-year increases in vessel calls, further straining operational efficiency.

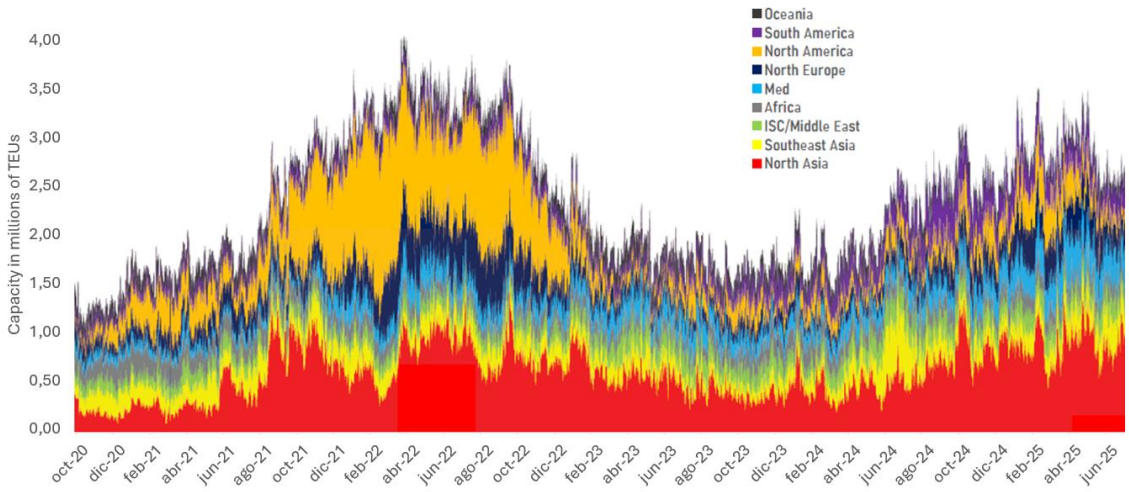
This resurgence in congestion cannot be attributed solely to increased traffic, but rather to a convergence of factors including the reorganization of shipping alliances, diversions around the Cape of Good Hope, the arrival of mega-ships, and the limited flexibility of many terminals. In this context, it is essential to continue closely monitoring regional trends in vessel calls, available effective capacity, and the measures implemented by ports to prevent this situation from persisting or worsening ahead of the peak activity period in the second half of the year.

Analysis of the Fundación Valenciaport

In recent months, global maritime transport has been affected by a significant resurgence in **port congestion** (Graph 1). According to Port Technology, 40% of vessels are experiencing delays, with increases of up to 300% at certain key ports. Singapore, Cape Town, and Rotterdam are among the most affected hubs, with waiting times occasionally exceeding ten days. This situation is beginning to create **strains on supply chains**, complicating berth scheduling and fleet rotation. The impact extends to shipping lines, port operators, and shippers alike, all within a context of high operational volatility and shrinking profit margins.

[1] Original new published by "Port Technology International" and available at: https://www.porttechnology.org/news/ports-face-surging-congestion-with-40-of-ships-delayed/

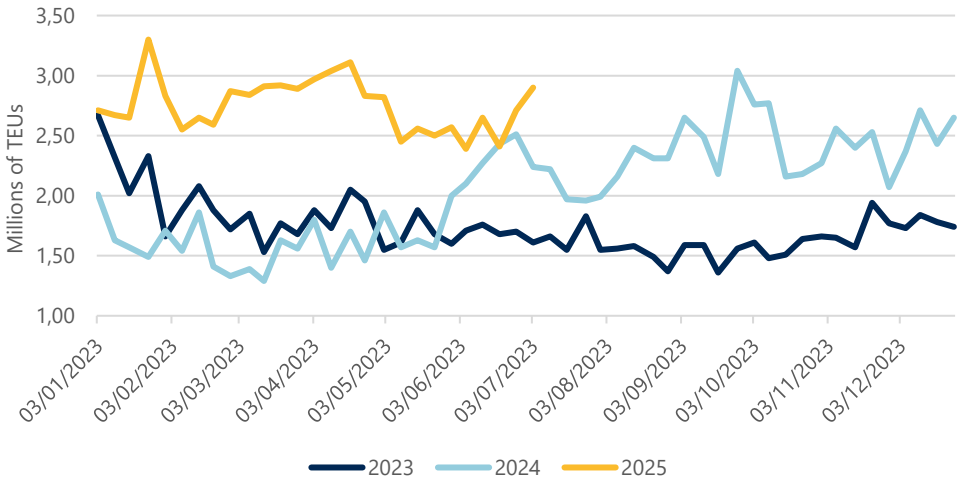
Graph 1. Port congestion by region



Source: Linerlytica

In this regard, the most recent weekly reports from Linerlytica for June 2025 confirm a **progressive increase in port congestion**, both in terms of affected capacity and geographic distribution. By the end of June, it was estimated that nearly 3 million TEUs were inactive due to congestion—equivalent to 9% of the global container ship fleet. This figure marks a **significant upward trend** compared to the same period in the previous two years (Graph 2). As a result, congestion has once again **absorbed a growing share of the global fleet**, surpassing levels not seen since the most acute episodes of 2021 and 2022. As previously noted, this trend has direct **implications for port operations**, service scheduling, and the behavior of the freight market.

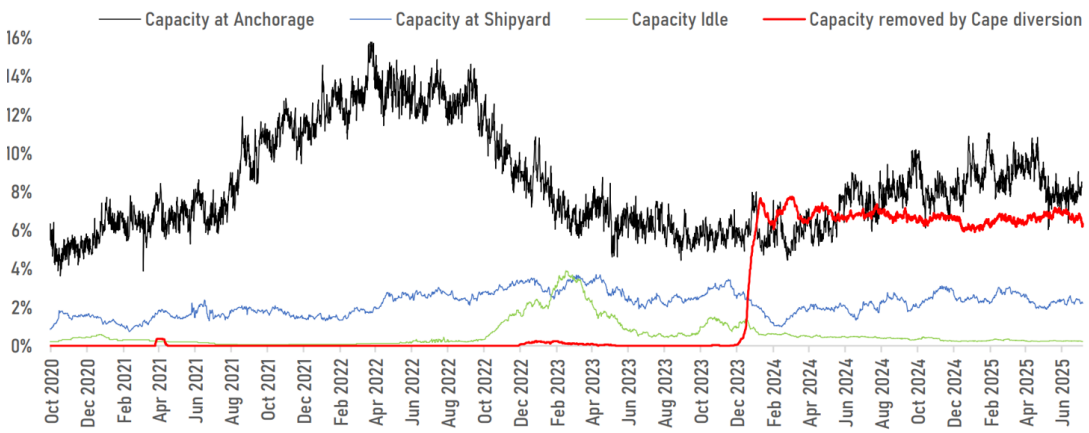
Graph 2. Evolution of TEUs affected by congestion (2023-2025)



Source: Own elaboration based on data from Linerlytica

In a context of high seasonal demand, operational constraints, and persistent pressures on certain routes, the **effective capacity of the global fleet** has once again been compromised by the accumulation of vessels waiting—both at anchor and at berth—as shown in Graph 3. Beyond the quantitative analysis, the key issue is that congestion is directly impacting the **effective availability of capacity**. Although the global fleet continues to grow with the delivery of new vessels, a significant portion of that capacity is not operational in practical terms. The result is increased pressure on rates, reduced service reliability, and a growing environment of uncertainty for shipping lines, logistics operators, and shippers.

Graph 3. Evolution of mooring capacity (% of world fleet)



Source: Linerlytica

One of the key aspects of the current surge in congestion is not just its scale, but its **geographic distribution**. Unlike previous situations where the impact was especially concentrated in North America or Southeast Asia, the current congestion map shows a different pattern. In 2025, **Northern Asia** has come to concentrate a significant portion of the affected capacity. This region—home to major port complexes such as Shanghai, Qingdao, and Busan—is operating above optimal levels, causing bottlenecks that are cascading downstream along the **main East–West trade routes**.

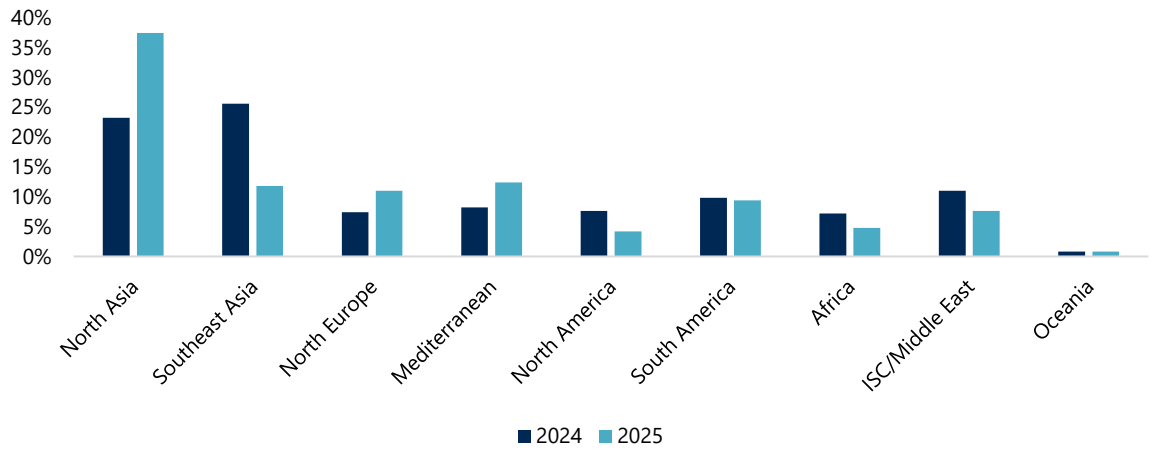
At the same time, **Southeast Asia** has managed to significantly **reduce its congestion levels.** The situation in Singapore, for example, has improved thanks to operational adjustments and exceptional measures such as port omissions or the rerouting of services to secondary ports like Port Klang or Tanjung Pelepas. While the impact has not disappeared entirely, there are **signs of recovery** in transit times and flow regularity.

In **North America**, there has also been **some improvement** compared to the previous year. The **gradual stabilization** of operations on the East Coast has led to a slight reduction in the proportion of vessels affected. However, **challenges remain** at intermodal hubs, with ongoing delays in the coordination between maritime and inland transport—particularly at locations such as Charleston and Savannah.

In **Europe**, the situation has evolved unevenly. In the **northern part of the continent**, ports such as Rotterdam, Hamburg, and Bremerhaven continue to face **high operational pressure**, occasionally worsened by external factors such as labor strikes or hydrological conditions on the Rhine. In the **Mediterranean**, **congestion** has **increased slightly**, partly due to the repositioning of services from Asia that are avoiding the Suez Canal and being redirected to alternative ports in Southern Europe.

Graph 4 provides a clear illustration of how the **epicenter of congestion has shifted** between June 2024 and the same period in 2025. It highlights how regions that recently bore the brunt of the issue have given way to others that now concentrate a larger share of the total number of delayed vessels. Understanding this **geographic shift** is essential for tracking market developments and anticipating potential short-term imbalances

Graph 4. Port congestion by region (june 2024 vs june 2025)



Source: Own elaboration based on data from Linerlytica

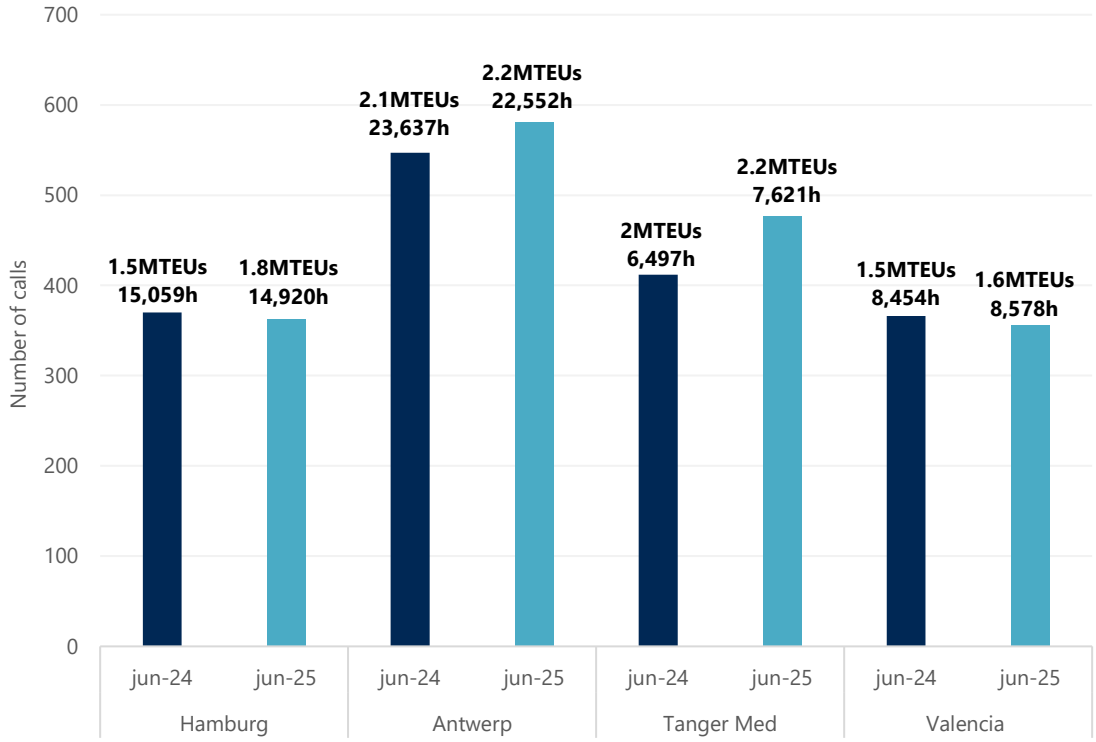
In addition to analyzing congestion levels, it is essential to examine **how the number of vessel calls has evolved** at major ports in Europe and North Africa. This helps determine whether the pressure in certain areas is due to an actual increase in traffic or, conversely, to a lack of operational capacity to adapt to shifts in demand.

According to Alphaliner data, and in general terms, some Northern European hubs such as **Hamburg** and **Antwerp** have recorded **moderate growth in the number of calls**, partly linked to the reorganization of services following the dissolution of shipping alliances. In the case of **Tanger Med**, the increase has been much more pronounced, reinforcing its role as a key hub for transit between Europe and West Africa. However, this trend has also made it more vulnerable to occasional episodes of saturation.

Meanwhile, the **Port of Valencia** shows a more stable evolution in terms of vessel calls. Nonetheless, its strategic position in the Western Mediterranean has made it a **waypoint or technical stop** in several reorganized services, placing greater operational demands on the port, especially during weeks of peak traffic. Graph 5 summarizes the year-on-year behavior of these four ports in terms of recorded vessel calls in June.

This behavior shows that congestion is not always associated with a **higher number of calls,** but also with other factors such as the **clustering of arrivals** within short timeframes, the average vessel **size**, and the **operational conditions** of each terminal.

Graph 5. Port congestion by region (june 2024 vs june 2025)



Source: Own elaboration based on data from Linerlytica

All in all, the resurgence of congestion episodes in June 2025 is the result of a **combination of structural and cyclical factors** that, together, have reduced the operational capacity of major global logistics hubs. Although the situation varies by region, a number of common causes can be identified that help explain the growing pressure on terminals.

One of the most significant reasons is the **reorganization of services** following the dissolution of major shipping alliances such as 2M. This breakup has necessitated the redesign of many service rotations and has concentrated vessel calls at specific ports, particularly in Northern Europe and Northern Asia. The launch of new consortia, still in the adjustment phase, has led to overlaps, unexpected omissions, and bunching of vessels outside their scheduled windows, making port planning more difficult and temporarily overwhelming available capacity.

In this context, the **operating model** of the new Gemini Cooperation group stands out, having achieved **reliability levels above 90%** since its rollout—well above those of other alliances. This improvement is based on a more controlled network structure, focused on strategic hubs and more synchronized services. Additionally, the rerouting of volumes from terminals managed by this group to other facilities has helped **ease congestion at**

certain nodes, but has also increased pressure at terminals not integrated into the alliance, creating new congestion hotspots.

The **rerouting of services via the Cape of Good Hope**—now a consolidated alternative to the Suez Canal due to security concerns in the Red Sea—has also played a role**.** This shift has significantly altered transit times, leading to less regular arrivals and temporary vessel bunching. In many cases, terminals are not equipped to handle these peaks without compromising the overall efficiency of the system.

The **sustained growth of the global fleet**, particularly with the arrival of new mega-ships, is another critical factor. While these vessels bring volume efficiencies, they also require highly synchronized port operations. When several arrive at the same port simultaneously, pressure on cranes, yards, and intermodal connections increases exponentially, and any delays are quickly magnified throughout the network.

At the same time, many port infrastructures suffer from **limited operational flexibility.** A lack of available space, congested land access, and challenges in mobilizing specialized labor constrain their ability to respond to high-demand scenarios. This rigidity has been exacerbated by external factors such as labor strikes in Germany or low water levels on the Rhine, which have hindered inland cargo evacuation.

Finally, there is the compounding **effect of congestion itself**. When a vessel arrives late at one port, it often accumulates further delays in subsequent calls. This phenomenon, especially noticeable at hub ports, creates a ripple effect throughout the rotation, reinforcing the vicious cycle of congestion. Table 1 summarizes the main identified causes and their operational impacts.

Table 1. Structural and economic causes of port congestion and its operational impact

Main cause	Effect on congestion
Alliances breakup	Accumulation of calls and operational adjustments
Rerouting via Cape of Good Hope	Irregular arrivals and temporary situation
Introduction of new mega-ships	Increased pressure on vessel calls and unloading
Lack of operational flexibility	Longer waiting times and yard saturation
External conditions (strikes, weather, etc)	Delays and logistical uncertainty

Source: Own elaboration

Geographically, these factors do not manifest with the same intensity across all regions (Illustration 1). While **Northern Asia** is primarily affected by the clustering of vessel calls and hub saturation, **Northern Europe** is more impacted by service reorganization disruptions and labor-related issues. In the **Western Mediterranean** and **North Africa**, increased volume and traffic diversions have tested the limits of available operational capacity.

Illustration 1. Geographical location of some of the main logistics drivers contributing to the overall congestion observed in June 2025.

Source: Own elaboration

Overall, the observed congestion is not the result of a single cause but rather an **overlap of factors** that have reinforced each other. Its **multidimensional nature** requires a coordinated response among shipping lines, port authorities, and logistics operators, with both short- and medium-term measures. **Continuous monitoring** of these factors will be key to anticipating future disruptions and improving the resilience of the international logistics system.

The surge in port congestion during June 2025 confirms a **changing trend** that is already affecting multiple regions, especially Northern Asia, Northern Europe, and the Mediterranean area. Although the **intensity and causes vary** according to local contexts, the operational impact is clear.

The combination of new balances in shipping alliances, seasonal pressure on services, and the lack of flexibility in many infrastructures is creating a **highly uncertain scenario for the short and medium term**. In this context, it will be essential to continue monitoring the evolution of congestion levels, the effective available capacity, and changes in calling patterns, to anticipate possible logistical disruptions and adapt the commercial and operational decisions of the various sector stakeholders.