Substantial blank sailings on Transpacific

The current political climate is extremely volatile and given that tariffs are being imposed and suspended on an almost daily basis, we assume that both the shipping lines and cargo owners are only adjusting their short-term supply chains for now and waiting for things to settle down (one way or another), before making longer-term network adjustments.

For the 4-week period of weeks 16-19 (this week + the next three weeks), we have looked at the capacity scheduled at different points over the past six weeks, to get gauge the impact of tariffs. On Asia-North America West Coast, 1.43 million TEU was scheduled for deployment for weeks 16-19 in week 10. This remained consistent at week 11, and only slightly decreased to 1.40 million by week 12. In week 13, however, scheduled deployed capacity for weeks 16-19 dropped by -8% week/week to 1.29 million TEU, further dropping to 1.37 million TEU by week 15. Overall, this is -12% lower than what was scheduled six weeks ago.

On Asia-North America East Coast, scheduled capacity for weeks 16-19 declined from 1.01 million TEU scheduled by week 10 to 867,000 TEU scheduled at week 15, which represents a -14% decline across the 6-week period.

Fig. 1: Week 16-19 Blank Cap Outlook over 6 weeks (TP)

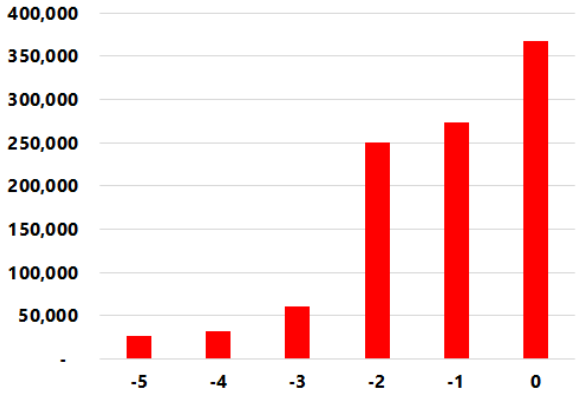

Figure 1 shows the blank sailings impact of the current tariffs, on the combined Transpacific trade, i.e. combined across Asia-NAWC and Asia-NAEC. Three weeks ago, "only" 60,000 TEU was scheduled to be blanked for weeks 16-19. This increased to 250,000 TEU in the space of a week, as carriers announced a raft of blank sailings in response to the tariffs. Another significant increase came in week 15, with the total blanked capacity for weeks 16-19 increasing to 367,800 TEU.

A similar impact is not seen on the Transatlantic trade, where capacity is largely holding steady, especially now considering a 90-day suspension of tariffs has been announced, by both the Trump administration and the EU.

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