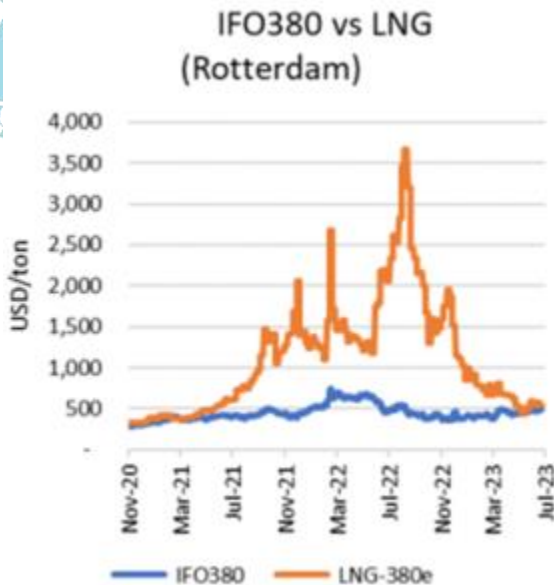


GLOBAL FREIGHTS

- Slower speeds are being implemented across many carriers including Maersk and MSC. This will lead to an increase in transit times of an average of 1-2 days.
- A compromise has been reached by IMO to aim to cut greenhouse gas emissions by 50% by 2050. Milestones have been set at 20% by 2030 and 70% in 2040.
- In May 2023, global seaborne container trade dropped by 3.0% compared to May 2022.
- As the search for alternative fuel sources continues, a few options have emerged including liquified natural gas (LNG), ammonia and methanol. Maersk has taken a delivery of the world’s first dual-fuel methanol-ready container ship which can cross from South Korea to Europe for a fully ‘green’ voyage.
- The fuel price index for LNG as maritime fuel in Rotterdam shows that the market has switched from an extreme premium to an outright discount for using this type of fuel:



NORTH AMERICA

Ports situation

- NY/NJ import flows remain steady through the first half of 2023. Port is operating smoothly with no reported issues like those delays experienced in 2022.
- Toronto/Montreal ports are operating well. Warehouses are approaching some capacity constraints. The Toronto market is seeing a reduction in the warehouses offering green storage as the number reduced from 4 to 3 warehouses in the market as roasters reduce their pipeline and inventory levels.
- LA/LB continues showing increase in examinations. The area is one of the highest density exam sites in the country.

- Seattle market continues operating under reduced hours, which continues to impact longer dwell times of 4-6 hours to get equipment in and out of port.
- Houston/Nola gulf port operations have also been operating without any reported issues through the first half of the year.
- Vancouver port labor unions have reached a tentative new labor agreement. This will help to reduce the almost 10-day stalemate we experienced with the port workers who went on strike at the beginning in July.
- Jacksonville port situation once more is at a peak period and have seen reports of chassis equipment shortage in the local pools.

Inland transportation

- US spot trucking rates continue to remain stable with the exception of some specific lanes that have shown up to 26% +/- variation during the first half of the year.
- LTL carrier reliability has improved as warehouse partners are more consistent on appointment reliability.

EUROPE

Ports situation and inland transportation

- Northern EU ports are operating normally without any issues reported.
- Italian ports have been working regularly in the last period.
- Truck availability across Europe is good.

LATIN AMERICA

BRAZIL

Container availability and vessel space

- Container availability is much better than in previous months.
- There has been a slight improvement in vessel spaces, but anticipation is still necessary to request bookings.
- With dry port customs, clearances are being done but inspections are taking longer than usual.
- Customs' Drug Control Division at the Port of Santos is intensifying control over shipments. We had some containers selected by the department, mainly destined for Europe. Coffee is a commodity targeted by drug traffickers.
- Due to a storm that hit the South and Southeast region of the country last week, some ports (including the Port of Santos) had their activities interrupted for a few hours due to wind speed, which could lead to some delays in ship calls during this week.

COLOMBIA

- Container availability and spaces on vessels are good.
- Buenaventura is working with no delay. However, we keep monitoring the security situation around the city which is being handled by the national government.
- We have distributed cargo through different ports such as CTG and SMR. BUN has faced small strikes, even if they are not significant, that last a day or two and can affect efficiency. As a result, we've been distributing cargo through several ports.

OTHER

- Issues with Shipping Lines and some rollovers persist in some origins. The primary reasons are no space, no container allocation and inconsistent customer service on some of the carriers.
- Report of low water levels is being monitored out of Panama Canal, the most recent update is that the water levels are steady and draft limitations at 37.5 ft. The biggest impact could be on high tonnage vessels out of Asia. Some carriers have filed surcharges.
- As the Central America crop winds down, there is still some backlog out of some origins like Honduras, Mexico, Nicaragua, Guatemala and El Salvador, which is mostly attributed to the carrier situation.
- Primary focus on Latin milds is shifting from Central America to new crop of Peru. The situation so far is early on and carrier performance is okay. It is still early in the crop as at times the coffee sector is competing with reefers.

AFRICA

UGANDA, RWANDA & KENYA

Container availability and vessel space

- Vessel schedules are stable, and most shipping lines have, on average, 3 vessels per month.
- Containers are available in Kampala and Kigali for our current demand.

Trucks and border

- There was Kenyan driver strike that started on 12th July protesting against the introduction of retesting and driver fee rules, employment and minimum wage implementation and non-inclusion of drivers in critical decision-making organizations and forums. This has created disruption and delays. More than 5,000 trucks were stuck in Uganda/Kenya borders. The situation seems to be improving and trucks have started moving.
- Mombasa port is operating normally.

TANZANIA & BURUNDI

- Containers are available with most shipping lines and vessel schedules stable.
- Dar es Salaam port's berthing is normal with a timeline of 3 days. The documentation process is smooth, and deadlines must be strictly adhered to.

- It was announced that DP World is taking over Dar es Salam port operation. We are waiting on communication about any new strategy on port management and processes to be implemented.

ETHIOPIA

- There is a shortage of 20ft containers with all shipping lines.
- Transit to Djibouti is normal and the port is operating normally.

ASIA PACIFIC

VIETNAM

- CMA CGM: empty containers' availability is getting better but we are facing delays in sailing.
- Normal port operation and no issue with space availability.

INDIA

- The government included Cameroon on the List of Methyl Bromide phased out countries for Quarantine and Pre-shipment, which allows all imports from Cameroon fumigated with Aluminum Phosphine only.

AUSTRALIA

- The Australian Bureau of Statistics reports that the Australian Consumer Price Index rose 7.0% which led to a certain increase in prices on all services of local deliveries.

CHINA

- Regarding bag marking and documentation for shipment to China, the exporter's General Administration of Customs China (GACC) Number is now replaced by the Oversea Registration Number. List of exporters with corresponding Oversea Reg No can be found [here](#).

OTHERS

- SUCAFINA BRASIL has renewed with Korea's Ministry of Food and Drug Safety (MFDS) and is now valid through 26-Jun-25.