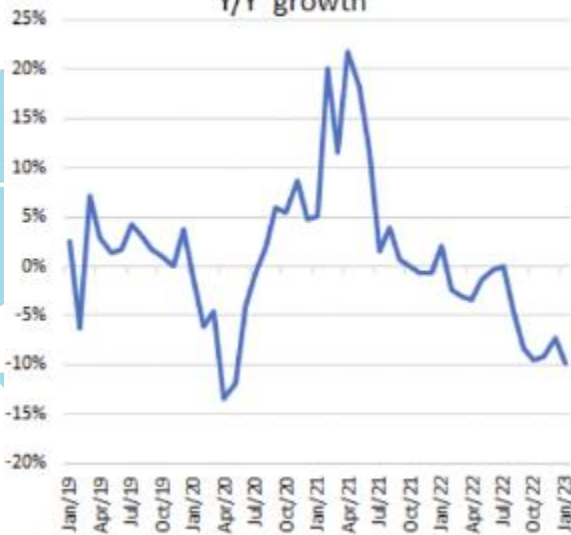


GLOBAL FREIGHTS

- Global demand continues to decrease.
- We are seeing some freight rates approaching pre-Covid levels.
- To keep pressure on rates and maintain them at sustainable level for carriers, some carriers have instituted increasingly blank sailings from Asia.

Fig. A1: Global demand (TEU)  
Y/Y growth



Source : Xeneta, sea-intelligence

NORTH AMERICA

Ports situation

- NY/NJ port situation through Q1 of 2023 have operated smoothly. One key terminal of APM is operating at capacity but drayage partners and terminal operators are working closely to extend appointments
- Toronto CN/CP rail heads are working better but seeing an uptick in congestion through month of March, the warehouse operators though are still seeing capacity constraints
- Oakland/Seattle/LA/LB are all seeing some kind of labor shortages. Equipment continues falling into inaccessible areas causing delays in pick-up appointments
- Jacksonville port is experiencing congestion, and this is adding to longer driver dwell times averaging 5+ hours to get into port.
- Houston port operations have greatly improved through Q1, warehouses are doing better on turnaround times
- Montreal & Vancouver warehouse operations still dealing with challenging capacity issues, this is causing longer discharge times, causing a potential for detention charges to impact importers

## Inland transportation

- Most US spot trucking rates have experienced a progressive but small-scale increase over the last few weeks, it's been manageable and mostly stable
- LTL carrier reliability is still a challenge and looks like it will remain so for the time-being, pickup appointments and smooth deliveries are some of the biggest issues here
- Capacity for pickups and deliveries of full containers at coffee warehouses seem to have improved considerably, at least at some our most used locations, this has resulted on better transits and help us to perform on a timely manner

## EUROPE

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### Ports situation and inland transportation

- Le Havre port has been affected by ongoing strikes in France. Disruptions are expected to continue throughout mid April23.
- Congestion at European ports is currently under control and manageable. However, continued strikes across Europe might worsen the congestion situation in ports.
- In UK, customs has started to implement new procedures for imports/exports. They are holding more containers than usual for inspection for longer periods of time and some containers are being diverted to other customs sites (Milton Keynes), causing disruption in the supply chain to our clients and unforeseeable extra financial inland charges.

## LATIN AMERICA

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### BRAZIL

- Container availability is much better than before.
- 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.
- As per NPPO Brazil's latest instructions on the Phytosanitary certification, we kindly remind independent companies to change their certification so that it does not mention NPPO Brazil's certificate title.

### COLOMBIA

- Container availability is good.
- From Cartagena, there are no issues with space availability.
- From Buenaventura, most shipping lines are working properly apart from a selective few who only have spaces from the end of April or early May.

### OTHER

- Peru: It is the end of the harvest and contracts are being finalized.

## SUCAFINA SA

- Mexico, Guatemala, Honduras and Nicaragua: Starting to see some influx of coffee as the harvest has ended. More shipments are in the pipeline.
- Honduras and Nicaragua: No 20-foot containers are available.
- Since the ports of CAM are small, every year as soon as the harvest starts there is a lack of bookings and container availability. Just like in previous seasons, we are starting to see some difficulties in container availability and an increase in spot freight from these origins.

## AFRICA

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### UGANDA, RWANDA, AND 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.
- Container shortage in Nairobi with some shipping lines have in March but there is a positive outlook for April.

#### Trucks and border

- Trucks are available and border operations are running smoothly.
- There are riots happening in Nairobi by the opposition political party on selected days of the week. We are monitoring the situation. No major impact on trucking at the moment.
- Mombasa port is operating normally.

### TANZANIA & BURUNDI

#### Container availability, vessel space and port situation

- Vessel schedules are stable. Most shipping lines have, on average, 3 vessels per month.
- Containers are available with most shipping lines.
- Dar es Salaam port's berthing delays are normal and average 5 days.

### ETHIOPIA

- We are experiencing shortage of food grade containers.
- There was a slight disruption of rail transport to Djibouti but now transit to Djibouti is back to normal.
- The port is operating normally.

## ASIA PACIFIC

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- All ports are operating normally.
- No big issue with vessel space and container availability out of Asian ports, except for Asia-Latam routes due to restricted carrier choices versus increasing demand.
- PNG is still an exception due to the sparse sailing schedule out of Lae with roughly 2 vessels per month.

## OTHERS

- Hong Kong just welcomed and handled the first 24,000+ TEU Hong Kong-flagged OOCL Spain, one of the world's largest vessels on 25 Mar.
- A.P.Moller – Maersk just launched Europe-China air freight service on 20 March. They sent the first scheduled air cargo operation between Denmark and Asia.
- More and more vessel operators join India-Russia trade lane recently due to rapid demand increase. One typical event is the containerized service expansion from Novorossiysk to Nhava Sheva and Mundra in West India carried out by Ruscon early March.

