SHIPPING AND LOGISTICS SOLUTIONS

2025

AGILE NEWSLETTER

VOL.28

Week 11/2025

Oil & Bunker Outlook

Crude Oil Prices:
Prices remained sensitive to U.S.-China trade developments and inventory data, with Brent and WTI both down ~1% week-over-week.

- WTI Crude Oil: The price slightly decreased of around 0.97% to reach $66.62 / barrel.
- Brent Crude Oil: The price also saw a decrease during the week of around 1.04% to reach $69.63 / barrel.
- 380 HSFO: The price increased by 1.26% to reach $501.76 / ton.
- VLSFO: The price decreased by 0.31% to reach $580.05 / ton.

Recent Factors affecting the market:

- Tariffs Impacts: U.S. import tariffs sparked demand concerns, capping price gains despite EIA’s reduced surplus forecasts.
- Geopolitical Risks : Potential easing of Russian sanctions and OPEC+ output increases kept markets cautious.

For more about latest Oil News:
Weekly Market Report

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Dry Bulk Index heading towards new lows

The Baltic Dry Index (BDI) experienced significant volatility during Week 11 of 2025, reaching a 15-week high amid mixed demand signals and geopolitical developments.

- **Increased Shipments of Iron Ore:** Iron ore demand initially rose on expectations of Chinese steelmakers resuming production.
- **US Tariffs:** Indirect pressure emerged from potential Chinese retaliatory measures, though immediate impacts were muted
- **New Buildings:** BIMCO forecasts weaker rates post-Q1 if fleet growth outpaces demand.

For more info:
Baltic Exchange Dry Index Hits 15-week High

Containers' Shipping Outlook

The container shipping market faced significant volatility during Week 11 of 2025 (March 10–13), shaped by geopolitical tensions, tariff impacts, and capacity adjustments.

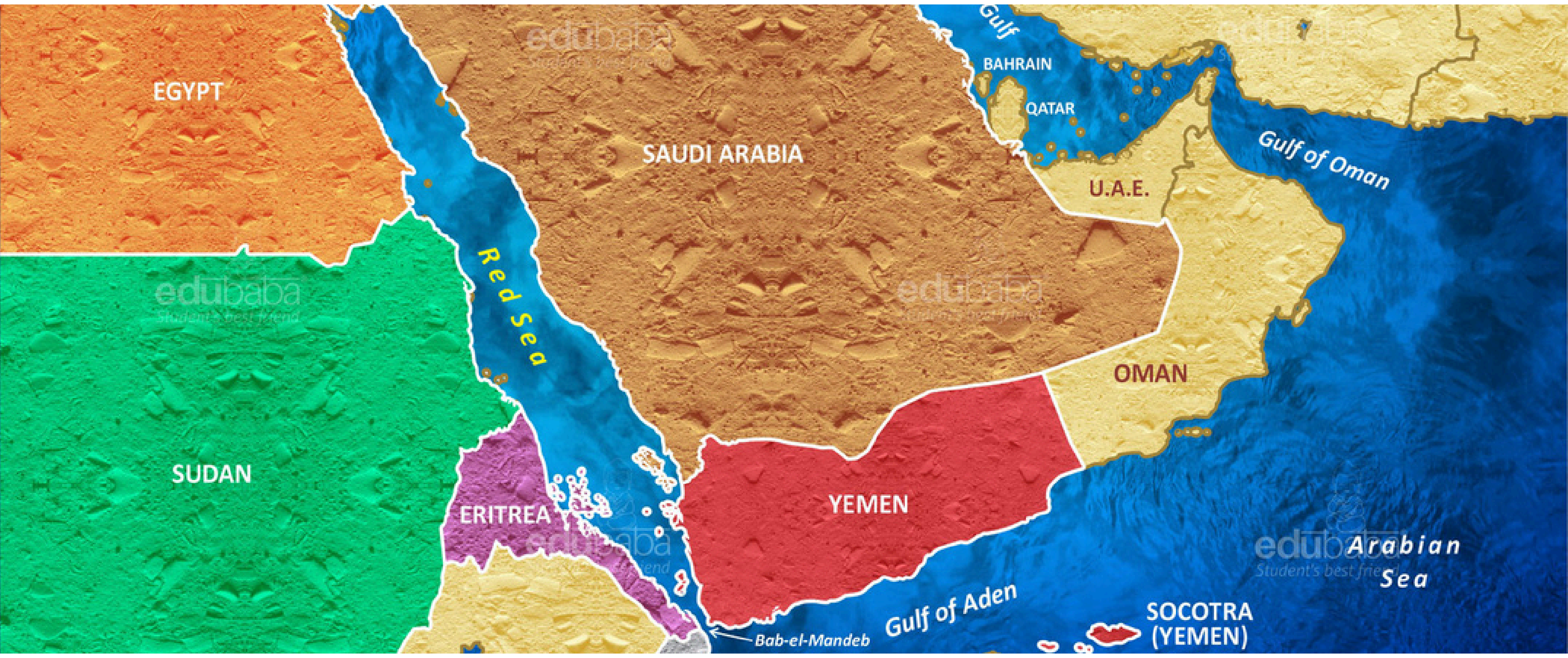
Here are some insights about the latest factors affecting the rates:

- **U.S. Tariffs and Frontloading:** New tariffs on imports from China, Canada, and Mexico led to frontloading, where importers rushed to move goods before tariffs took effect. This increased demand and rates in the short term but may lead to a downturn once tariffs are fully implemented.
- **Carrier Alliance Reshuffles:** Changes in carrier alliances, such as the Gemini Alliance and Premier Alliance, could lead to disruptions and additional fees initially but might eventually increase competition and lower rates.
- **Port Congestion & Labor Issues:** Although a major U.S. port strike was averted, ongoing congestion at key ports and potential labor disputes remained concerns that could impact rates.
- **Fuel & Sanctions:** Strengthened sanctions on the "ghost" fleet transporting Russian oil could impact fuel availability and costs, indirectly affecting shipping rates.
- **Capacity Management:** Carriers' ability to manage capacity effectively will be crucial in maintaining rate levels, especially if the Suez Canal reopens and demand patterns shift.

For more about Container Shipping News:

Ocean Freight Market Updates

Situation in the Red Sea



The Houthis have officially resumed attacks on Israeli-linked shipping as of March 12, 2025, following the decision to block humanitarian aid to Gaza after the expiration of the January ceasefire.

Effective March 12, the Houthis declared a ban on all Israeli ships in the Red Sea, Gulf of Aden, Bab el-Mandeb Strait, and Arabian Sea, targeting vessels violating this restriction.

Resuming attacks is expected to lead to an upward pressure on War-risk Premiums & Freight Rates consequently.

On the other hand, sustained attacks risk permanent displacement of 25% of global container traffic from Suez Canal by 2026

For more about Container Shipping News:

Yemen's Houthis to resume attacks on Israeli ships after Gaza aid deadline ended

Chinese companies look to Egypt to support exports as US-China tariffs continue to rise

Amid the ongoing trade tensions with the United States, Chinese companies are progressively turning to Egypt as a crucial center for investment and production.

Mostafa Ibrahim, Deputy Chairman of the China Committee at the Egyptian Businessmen's Association, forecasts that Chinese investments in Egypt will reach between $2 and $3 billion by 2025.

A significant portion of these investments is expected to be directed toward the Suez Canal Economic Zone (SCZone), an area that has become a focal point for Chinese companies looking to establish a strong presence in Egypt.

With over 2,000 Chinese companies already operating in Egypt, contributing more than $8 billion in investments, Egypt has become one of China's largest and most important trading partners in the region.

The trade war between the US and China has led to escalating tariffs, particularly with the recent increase in tariffs on all Chinese imports to the US, which now stand at 20 percent.

In response, China has retaliated by imposing tariffs on US agricultural products and industrial goods, further complicating trade between the two countries.

These tensions have pushed many Chinese companies to seek alternative manufacturing bases that can help mitigate the effects of these tariffs and safeguard their exports to key markets.

Egypt's role as an alternative manufacturing and export hub is becoming increasingly significant in this context.

For more info:
Chinese companies look to Egypt to support exports as US-China tariffs continue to rise

Egypt and MSC Forge Strategic Partnership to Revolutionize Logistics Sector

MEDITERRANEAN SHIPPING COMPANY

Egypt's Ministry of Industry and Transport has signed an MoU with Swiss-based Mediterranean Shipping Company (MSC), the world's largest shipping line, to modernize the country's maritime and logistics infrastructure. The agreement, finalized on March 12, 2025, aims to position Egypt as a global hub for trade and logistics under its Vision 2030 strategy.

The MoU focuses on five pillars:

1. **Seaport Development:** Expanding capacity and efficiency at Egyptian maritime ports, including upgrades to the Suez Canal Economic Zone.
2. **Container Terminal Management:** Implementing advanced operational practices to streamline cargo handling.
3. **Dry Port Expansion:** Building new facilities like the 10th of Ramadan City logistics zone to reduce seaport congestion.
4. **Rail Freight Networks:** Enhancing rail links between ports and industrial zones to lower transport costs and road traffic.
5. **Maritime Innovation:** Exploring cutting-edge logistics solutions, including digitalization and green technologies.

For more info:
Egypt & MSC partner to transform ports and logistics

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