

Logenix Global Insider

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IN THIS ISSUE

Key Developments

Global Health Supply
Chain Summit:
Rwanda

Global Market Update

Industry News

Connect with Us

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NOVEMBER 2025 KEY DEVELOPMENTS

In January 2025, the Trump administration launched a sweeping review of U.S. foreign aid, proposing a significant restructuring that includes consolidating key functions within the State Department.

November 13 ● The U.S. Department of State launches bilateral health talks with 16 African nations. [Read more.](#)

November 21 ● The U.S. Department of State committed \$4.6 billion to the Global Fund during its eighth Replenishment Summit in Johannesburg. [Read more.](#)

Global Health Supply Chain Summit: Rwanda

Logenix is once again proud to have been a primary sponsor of the 2025 Global Health Supply Chain Summit in Kigali, Rwanda. Logenix has supported GHSC as a main sponsor for over a decade now. This year's summit was a sold-out event that brought together many of the partners and professionals we've worked alongside for decades. Given the sweeping changes to international assistance caused by the dismantlement of USAID, all attendees were focused on mutual collaboration to try to ascertain what the future of this vital sector may hold.

The GHSC schedulers were able, at literally the last minute, to arrange the attendance and remarks by a Department of State contingent led by Jeff Graham, the senior bureau official for the Bureau of Global Health Security and Diplomacy (GHSD). The sold-out first morning session was standing room only to hear what most hoped would be a detailed outline of how the United States intends to support international assistance. While Mr. Graham emphasized a shift toward bilateral agreements and deeper collaboration with government, private-sector, and faith-based partners, his remarks were short of the details many attendees hoped might be forthcoming. The general message was that the U.S. is not stepping back from global health leadership, but as Mr. Graham put it, "We're not abandoning global health leadership – we're transforming it."

This new direction marks a significant shift in how future work across the developing world will be carried out. Trials over the past couple of years have exposed the private sector's reluctance to embrace ownership of the entire supply chain, as well as extensive challenges when ownership was extended past supplier loading docks. How, and if, this new philosophy can succeed will be tested over the coming years.





GLOBAL MARKET UPDATE

AIR INSIGHTS

- INDIGO HAS LAUNCHED A NEW DELHI-MANCHESTER ROUTE, ITS THIRD UK SERVICE, WITH FIVE WEEKLY FLIGHTS USING BOEING 787-9S STARTING NOVEMBER 15. THIS MARKS THE FIRST NONSTOP SERVICE IN 25 YEARS.
- ETHIOPIAN AIRLINES HAS INTRODUCED PEAK SEASON PRICING DUE TO RISING DEMAND AND A 175-METRIC-TON BACKLOG. THE SURCHARGE WILL APPLY TO ALL BOOKINGS THROUGH EARLY JANUARY.
- CHINA EASTERN AIRLINES HAS RESUMED ITS SHANGHAI-DELHI SERVICE ON NOVEMBER 9 AFTER NEARLY 5 YEARS. IT ALSO HAS PLANS TO RESUME THE KUNMING-KOLKATA ROUTE AND ADD A NEW SHANGHAI-MUMBAI SERVICE IN THE UPCOMING MONTHS.
- HONG KONG AIR CARGO HAS BEGUN OPERATIONS AT EAST MIDLANDS AIRPORT, BECOMING THE SEVENTH CARGO CARRIER TO JOIN EMA SINCE ITS CARGO EXPANSION PUSH BEGAN. THE FIRST FLIGHT ARRIVED ON NOVEMBER 18.

The world is facing significant reductions in global aid funding, and the impacts are starting to be felt across leading institutions. The World Health Organization (WHO) has announced significant staffing cuts as part of a large-scale restructuring driven by declining donor support. Provisional figures shared with member states indicate that WHO will reduce its workforce by up to 25% by June 2026. The organization notes that these cuts are part of a broader effort to stabilize operations amid sustained budget pressures.

As we continue to follow the Drewry World Container Index (WCI), after four consecutive weeks of increases, the index fell by -5% last week and has now leveled off, remaining unchanged. This stabilization comes as carriers attempt to tighten capacity and lift rates ahead of upcoming contract negotiations. Asia-Europe carriers are also pushing spot rates higher by implementing new Freight All Kinds (FAK) rates effective December 1.

With overcapacity still weighing on the market, carriers are relying heavily on General Rate Increases (GRIs) to keep prices afloat. Unless additional GRIs take effect or demand shows meaningful improvement, Drewry expects rates to soften further in the coming weeks.

Blank sailings are easing after carriers announced 73 cancellations in November, down from 96 in October. Out of 719 scheduled sailings, 48 (7%) have been withdrawn between weeks 48 and 52, with the majority concentrated on Transpacific eastbound (48%) and Asia-Europe (29%) services.

OCEAN INSIGHTS

- EVERGREEN WILL EXPAND ITS INDIA-MOZAMBIQUE-KENYA SERVICE IN EARLY DECEMBER, ADDING NEW MIDDLE EAST COVERAGE. THE ROTATION WILL RUN JEBEL ALI – MUNDRA – NHAVA SHEVA – MOMBASA – DAR ES SALAAM – BEIRA – MAPUTO – JEBEL ALI.
- CMA CGM WILL APPLY \$200 PER TEU PORT CONGESTION SURCHARGE TO BEIRA, MOZAMBIQUE, EFFECTIVE NOVEMBER 15.
- SINGAPORE SHIPPING COMPANY X-PRESS FEEDERS RECENTLY LAUNCHED A NEW CHINA-RED SEA ROUTE.
- HAPAG-LLOYD HAS INTRODUCED PEAK-SEASON SURCHARGE (PSS) FOR \$600/TEU & \$950/FEU FROM ASIA/OCEANIA TO PORT MOMBASA AND PORT DAR ES SALAAM. THIS IS APPLICABLE TO ALL GOODS ON NOVEMBER 16, 2025.
- GLOBAL FEEDER SHIPPING, RCL, AND TS LINES HAVE JOINTLY LAUNCHED A NEW FORTNIGHTLY FAR EAST-RED SEA SERVICE, WITH A ROTATION OF SHANGHAI – QINGDAO – GUANGZHOU – SHENZHEN – JEDDAH – SOKHNA – AQABA – JEDDAH – SHANGHAI.

Something new that we will begin tracking is the Drewry Breakbulk Sea Transport Indices, which provides a clearer view of pricing trends for both general and project cargo markets. The indices are relative to a January 2019 base of 100, meaning January 2019 represents a baseline “normal” market level before Covid-19, and current values show how rates have changed since then.

In the month of October, the General Cargo Index stands at 144, indicating rates are 44% higher than January 2019, while the Project Cargo Index is 167, or 67% higher. Tracking these indices going forward will help us gauge how pricing for general and project cargo continues to evolve amid shifting market conditions.

Global air cargo demand softened slightly, with chargeable weight down -3% week-over-week. All regions posted declines of -3% or less, with Asia Pacific and North America leading the downturn, while South Asia and Africa recorded slightly softer drops at -2% WoW.

From a two-week-over-two-week perspective, volumes fell across all regions, with global volumes down -1% 2Wo2W, led by Africa (-6%). Rates increased across every region, up +4% 2Wo2W, highlighting the current imbalance between softening demand and steady capacity growth.

On a year-over-year basis, chargeable weight increased +6%, driven by Asia Pacific (+10%), while Africa (-3%) was the only region to decline YoY. Capacity continues to rise, up +5% YoY, led by Africa (+12%). Rates, however, fell -4% YoY, with the largest declines coming from South Asia (-19%), while Africa (+1%) was the only region to see an increase.





Industry News

Breakbulk record for Jebel Ali

“DP World has announced that its flagship Jebel Ali Port handled a record 630,000t tonnes of breakbulk cargo in October 2025, the highest monthly total in nearly two decades.”

[Read Article](#)

Ocean rates tested by capacity conundrum

“Major liner operators are pulling levers in an effort to manage capacity as economic uncertainty in the world’s biggest market undercuts demand on the benchmark eastbound trans-Pacific trade lane.”

[Read Article](#)

Maersk: No timeline for Red Sea return

“Maersk on Wednesday denied published reports that it has set a timeline to resume services through the Red Sea and Suez Canal shipping route.”

[Read Article](#)



Thank You

We would like to thank all of our clients and partners for the impactful collaborations both featured and not featured in this newsletter.

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Logenix International | 3060 Williams Drive, Suite 400, Fairfax, VA 22031, USA
Privacy Policy | info@logenix.com | 703-256-4885

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