Portcast

Portcast Transit Time Trends Report

(Q4 2025)

This report analyzes the planned vs. actual ocean transit times across key global trade lanes in Q4 2025. Insights are based on October–December performance and focus on what changed during the quarter, why it happened, and how shippers and forwarders should plan ahead.

Executive Insight

Container shipping in Q4 has been shaped by various geopolitical and climate events. That, coupled with alliance restructuring and route disruptions, created high average unreliability in transit times. Rather than a uniform recovery, transit time performance in Q4 2025 varies sharply by trade lane, with some corridors stabilizing while others continue to experience sustained delays.

1. **North America → North/West Europe less impacted;** however, reliability declined toward year-end due to seasonal congestion and winter operating conditions. Compared to the same period in 2024, transit times increased by **0.7 days**, and were **0.3 days higher** than the rest of 2025.
2. **Asia → North/West Europe lane materially elevated**, driven by extended routing via Cape of Good Hope, with only partial easing in December. Compared to the same period in 2024, transit times increased by **2.3 days**, and were **1.9 days higher** than the rest of 2025.
3. **Asia → North America stabilized**, especially on the Transpacific, showing low volatility. Compared to the same period in 2024, transit times decreased by **6.6 days**, and were **4.8 days lower** than the rest of 2025.
4. **Shorter regional lanes were the most resilient segment,** though actual transit stayed slightly slower than planned. Still vulnerable to regional congestion and weather disruptions.

Across lanes, Q4 revealed a consistent pattern: delays were steady and predictable, but rarely reflected accurately in planned schedules.

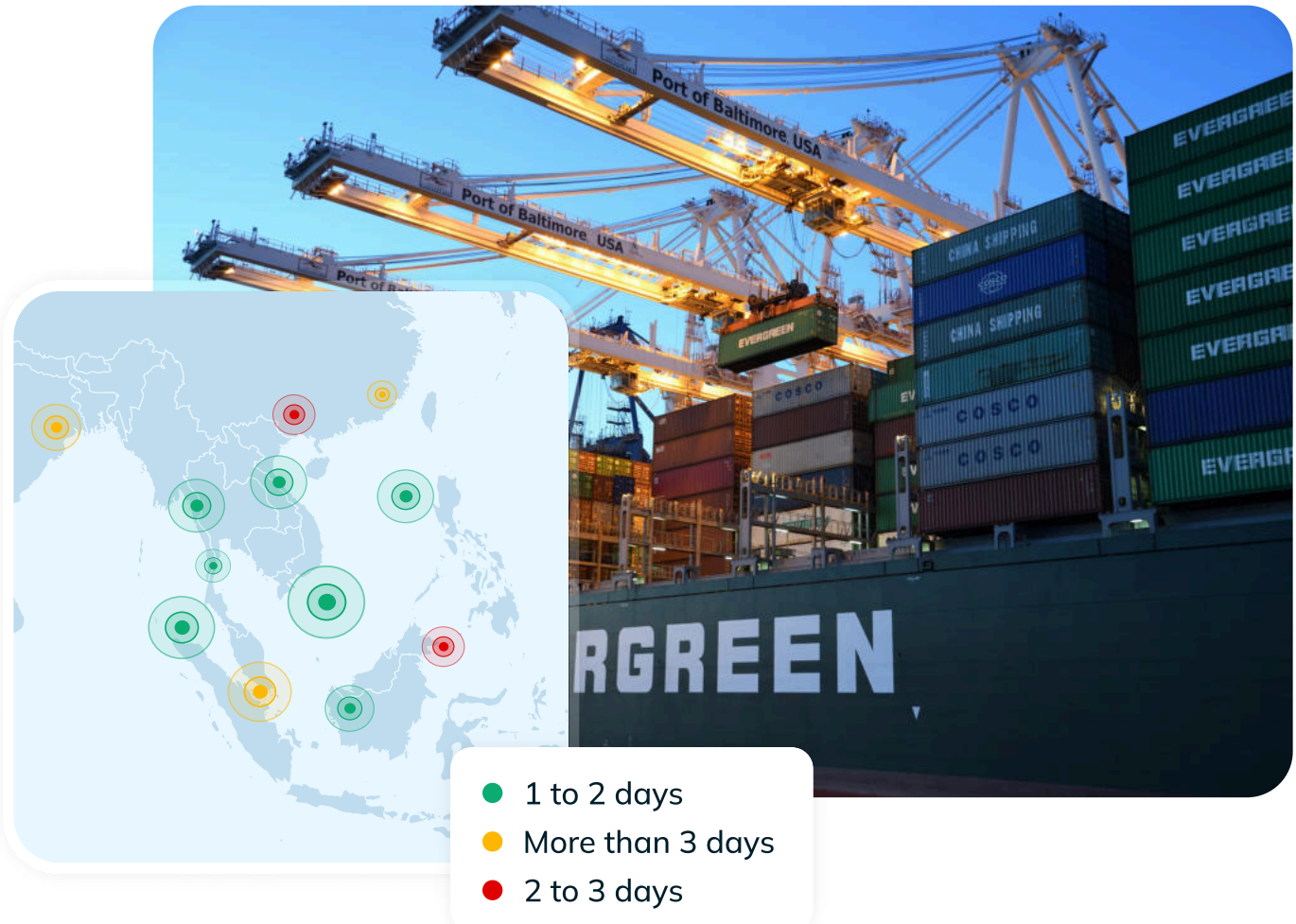
Additionally, our two-year analysis of container-ship voyages via the Cape of Good Hope and the Suez Canal shows **no meaningful surge yet or sustained recovery in Suez traffic,** despite recent industry sentiment.

Monthly voyage counts across both passages remain steady. As of now, the fluctuations we see fall within normal operational variance and do not indicate a structural change.

Macro Disruptions That Impacted Transit Times in Q4

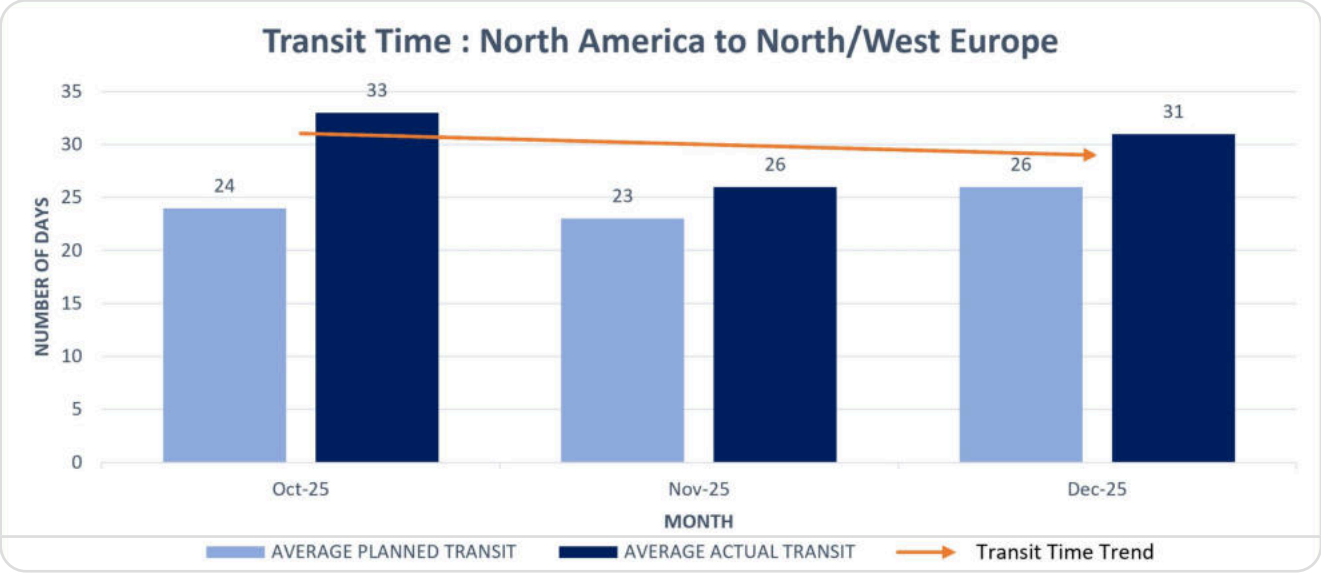
- **Continued Asia–Europe routings via the Cape of Good Hope,** which continued to add baseline (around 2.3 days) transit days compared to pre-disruption benchmarks.
- **Carrier Schedule Changes:** Alliance restructurings (e.g., 2M dissolution, Gemini launch, Ocean Alliance reconfiguration), blank sailings, and spillover from earlier disruptions caused irregular arrivals, resulting in vessel bunching and missed port calls.
- **Seasonal year-end cargo surges,** particularly for retail, consumer goods, and reefer-heavy commodities, increasing pressure on ports and vessel schedules.
- **Congestion at major North/West European gateways,** including Rotterdam, Antwerp, Hamburg, and Bremerhaven, affecting both inbound recovery and outbound departures.
- **Winter operating conditions in the North Atlantic,** leading to slower steaming, missed berthing windows, and reduced schedule recovery.

These factors did not cause sharp spikes, but collectively sustained longer transit times across multiple lanes.



1. North America → North/West Europe

*Avg. Actual transit was **delayed by 6 days** vs. planned transit*



Transit reliability remained weak through Q4, with actual transit consistently exceeding planned levels. A brief improvement in November did not carry through to December, signalling unresolved reliability issues.

Planned vs actual gap

- Actual transit exceeded by 25% of the planned transit time (i.e. avg. 6 days delay)
- Delays ranged from approximately 3 to 9 days
- Mid-quarter planning improvements did not hold into the year-end

Key Causes

- Congestion at key North/West European ports such as Rotterdam, Antwerp, Hamburg, and Bremerhaven
- Seasonal year-end cargo pressure increasing berth and yard utilization
- Winter North Atlantic conditions affecting sailing speeds and schedules
- Limited recovery flexibility after earlier delays

Operational takeaway

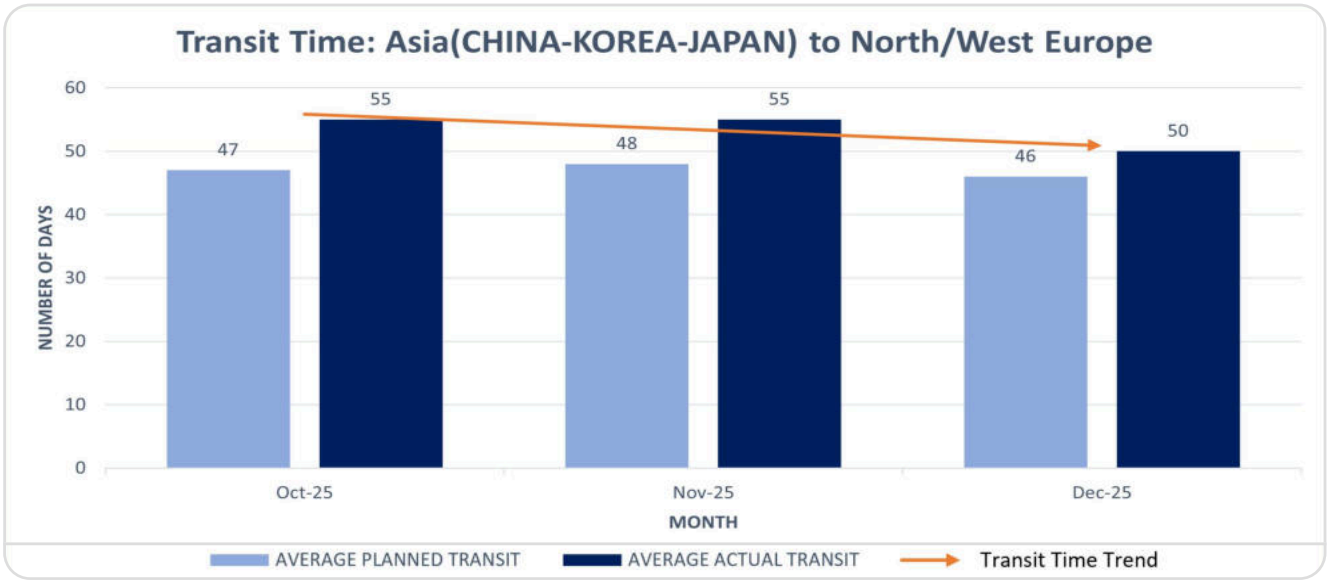
Europe-bound shipments required active monitoring in Q4. Static buffers based on planned schedules were insufficient, especially for December arrivals.

Q1 2026 planning implication

Assume continued transit risk early in Q1 and rely on dynamic ETA updates rather than fixed lead times.

2. Asia (China-Korea-Japan) → North/West Europe

*Avg. Actual transit **delayed by +6 days** vs. planned transit*



Transit times remained elevated throughout Q4, with actual transit consistently well above planned benchmarks. December showed improvement, but the gap remained meaningful.

Planned vs actual gap

- Actual transit exceeded by 13% compared to the planned(roughly 4 to 8 days)
- Average transit times extended by 25-40%, depending on the routing
- December improved, but did not eliminate the gap
- Planned schedules did not reflect current routing realities

Key Causes

- Continued Cape of Good Hope routings extending voyage length
- Congestion spillover at European ports limiting recovery
- Network adjustments due to alliance restructuring and blank sailings slowing normalization
- Year-end import demand, particularly for retail cargo

Operational takeaway

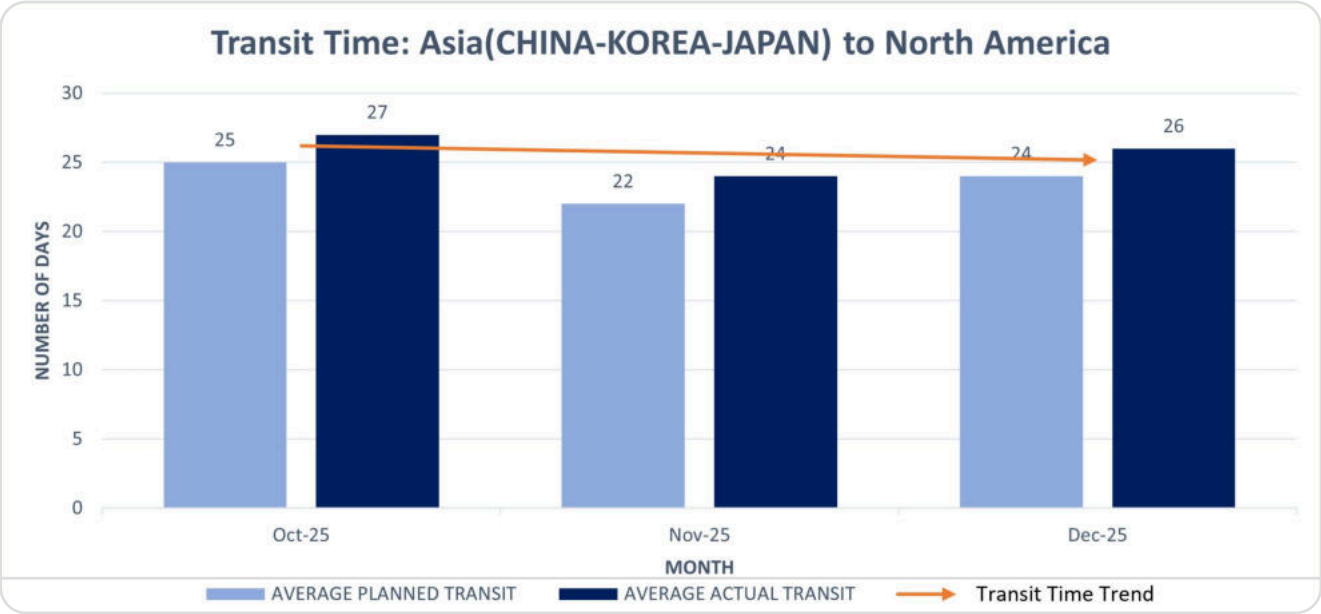
Longer transit times should be treated as the baseline, not as temporary exceptions.

Q1 2026 planning implication

Unless routing patterns change materially, extended transit should remain the planning assumption, supported by predictive ETAs for downstream coordination.

3. Asia (China–Korea–Japan) → North America

*Avg. Actual transit **delayed by +2 days** vs. planned transit*



Performance stabilized in Q4, with modest but consistent delays relative to plan. Volatility remained low across the quarter.

Planned vs actual gap

- Actual transit exceeded by 8% compared to the planned time (roughly 2 days)
- Planned transit varied slightly month to month
- The planning gap persisted despite stable execution

Key Causes

- Major ports such as Shanghai, Ningbo, and Busan experienced severe yard congestion and equipment shortages due to peak-season export surges.
- US West Coast ports, especially Los Angeles, Long Beach, and Oakland, saw heavy import volumes.
- Mild year-end volume pressure, especially in December

Operational takeaway

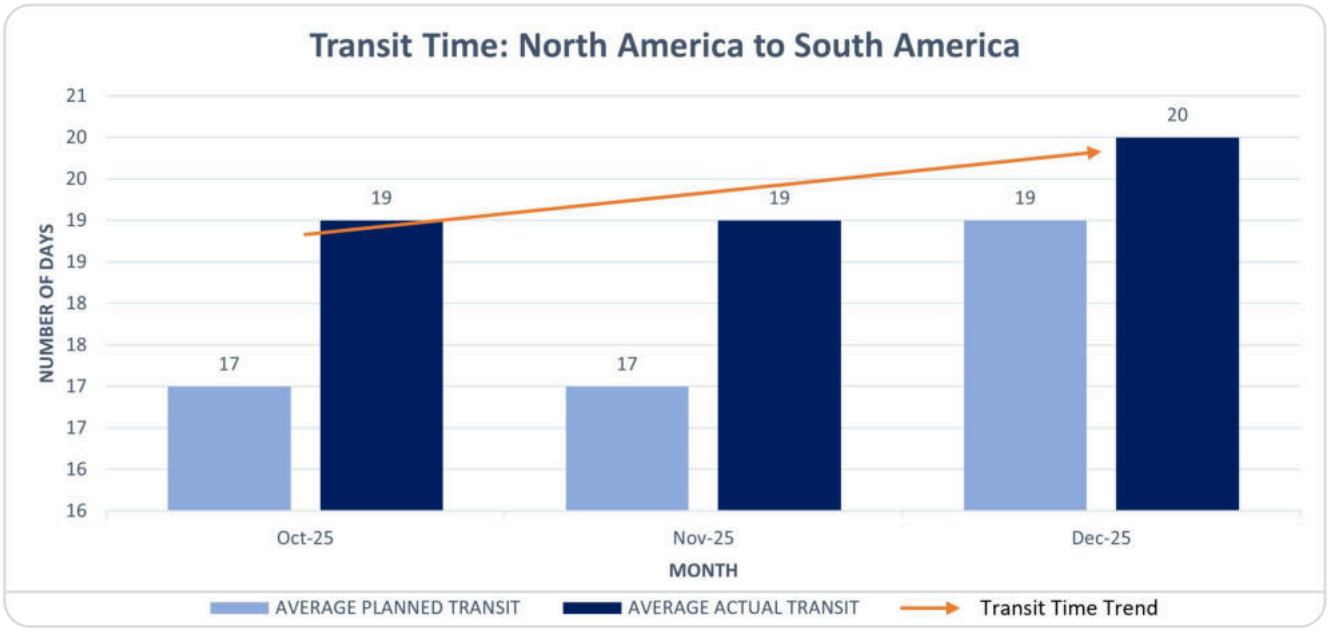
The lane was manageable, but teams needed to factor in a consistent planning offset.

Q1 2026 planning implication

Focus on refining planned transit assumptions rather than preparing for disruption spikes.

4. North America → South America

*Avg. Actual transit **delayed by +1 day** vs. planned transit*



This lane remained stable but consistently slower than planned. Variability stayed low, with a slight improvement by December.

Planned vs actual gap

- Actual transit exceeded by 6% compared to the planned (approximately 1–2 days)
- Planned transit increased in December, narrowing the gap
- Overall variability remained low

Key Causes

- Localized congestion at South American ports
- Seasonal agricultural and reefer exports
- Weather-related disruptions earlier in the quarter
- Equipment positioning constraints limiting recovery

Operational takeaway

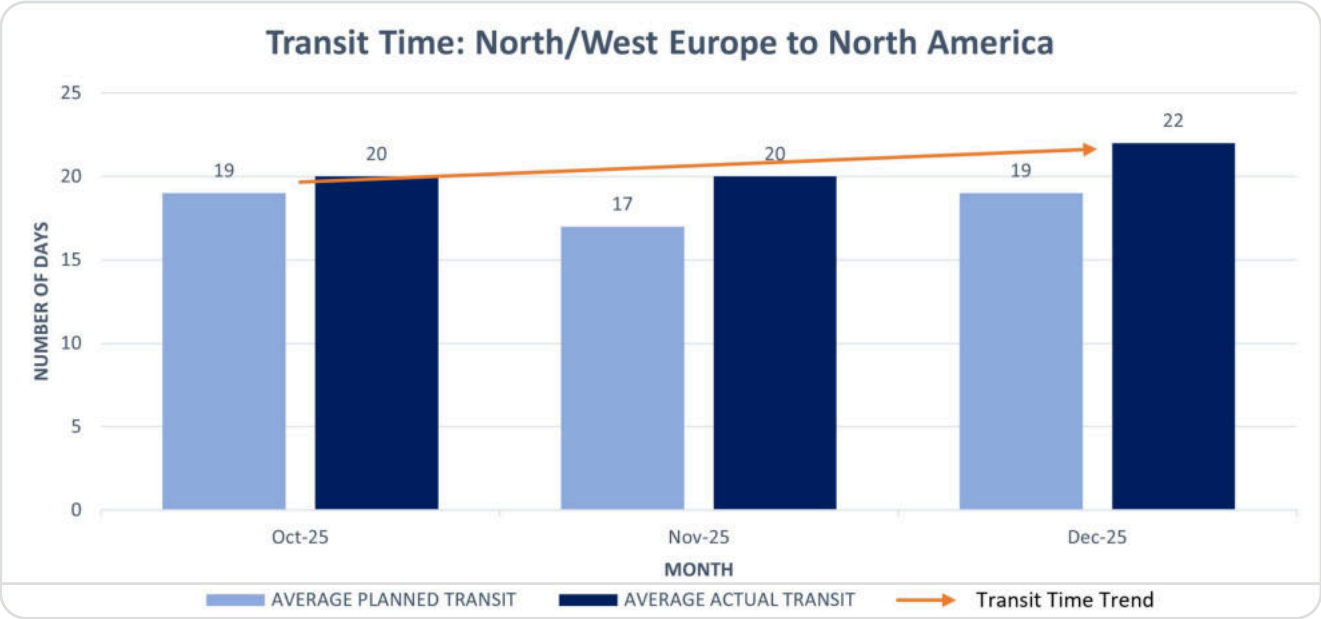
Small, predictable delays accumulated across sailings. Modest buffers were sufficient.

Q1 2026 planning implication

Maintain conservative buffers during peak export periods and monitor port-level congestion closely.

5. North / West Europe → North America

*Avg. Actual transit **delayed by +3 days** vs. planned transit*



Export reliability deteriorated toward year-end, with delays widening in November and persisting into December.

Planned vs actual gap

- The gap expanded by 17% compared to the planned (roughly 1 day to 3 days)
- November reflected overly optimistic planning
- December saw both longer planned and actual transit

Key Causes

- Congestion at European export ports, including Rotterdam, Antwerp, Hamburg, and Bremerhaven, delaying departures.
- Winter Atlantic conditions slowing crossings
- Limited schedule recovery after missed windows
- Inland evacuation delays increasing port dwell

Operational takeaway

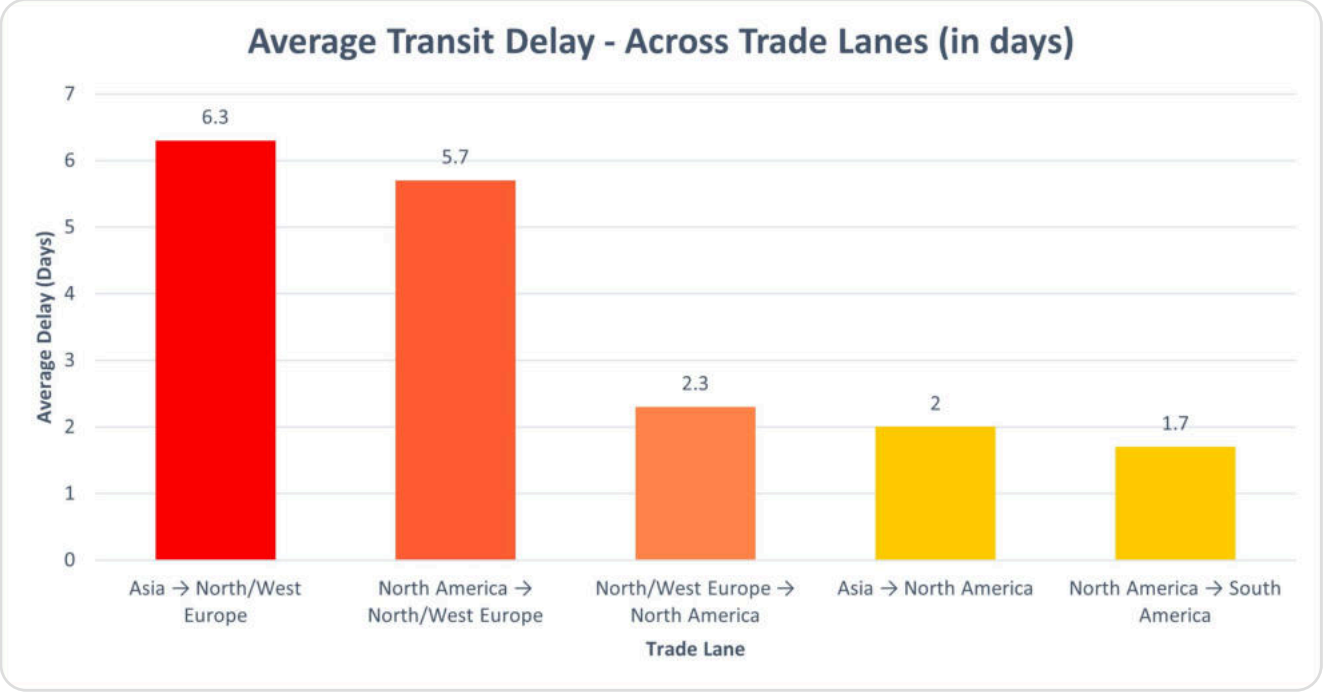
Late-quarter shipments carried a higher risk of delivery slippage. Outbound port readiness required closer attention.

Q1 2026 planning implication

Early Q1 reliability is likely to resemble December unless congestion eases materially.

Summary

Average Transit Delays Across Trade-lanes



Heatmap of average transit delays across key global trade lanes

Cross-Lane Takeaways

- Delays were **predictable in magnitude but persistent**
- Q4 reinforced that **reliability is shaped by cumulative micro-delays**, not single disruption events. Acting early makes the difference.
- Predictive ETAs added the most value where execution consistently ran slower than planned.

Portcast Advantage

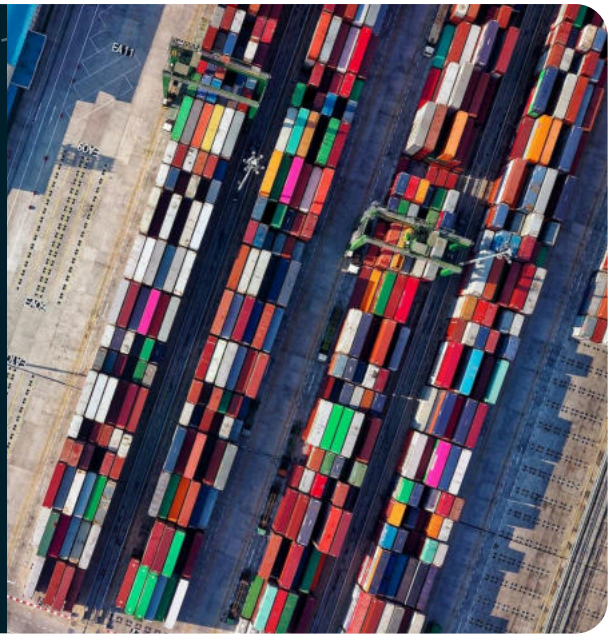
In addition to providing real-time tracking of shipments, Portcast combines **predictive ETAs, sailing schedule intelligence, and port-level signals** to help teams:

- Plan shipments using realistic transit expectations
- Adjust handoffs dynamically as conditions change
- Reduce last-minute firefighting caused by silent schedule drift

> What we saw in Q4 was not volatility, but consistency. When execution runs slower in a predictable way, predictive models outperform static schedules every time.
>
> *— Adrish Bir, Senior Data Analyst, Portcast*

Want to see how predictive visibility helps teams stay ahead of delays before they escalate?

Contact Us | www.portcast.io



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Real-time & predictive visibility for global freight

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