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Air Updates

Air Cargo Industry Jolted by Trump Tariffs on Chinese E-Commerce

President Donald Trump's weekend order eliminating a duty-free exemption for low-value e-commerce shipments from China could upend business models for many companies engaged in international trade, but stakeholders say the air cargo sector could take the biggest hit.

Chinese and U.S. marketplaces like Shein, Temu, AliExpress, Amazon and Shopify also could be significantly constrained in the short term.

The U.S. imported more than 2.5 million tons of cargo by air from China last year, including about 1.3 million tons of cheap e-commerce products that are potentially impacted by the U.S. decision to close the trade privilege as of this week. The rest is general cargo now subject to a new 10% tariff on Chinese goods, according to data from Netherlands-based air cargo consultancy Rotante.

Electronic retailers, logistics service providers, express carriers, customs brokers and others are scrambling to understand the new rules and how to reorient workstreams accordingly. Trade professionals say they are confused about how to adjust operations with only a vague announcement from the White House and few answers so far from U.S. Customs and Border Protection. The situation is still very fluid and projected impacts could change depending on

whether President Trump changes his mind – as he did Monday, giving Canada and Mexico a one-month reprieve on 25% tariffs – or the types of coping mechanisms companies identify.

Read more in an [article from FreightWaves](#).

Ocean Updates

Panama Bends to U.S. Pressure, Grants Free Navy Passage Through Canal

Panama promised free passage for U.S. warships through the Panama Canal and said it will withdraw from China's signature lending program after Secretary of State Marco Rubio blasted the government during his visit on Sunday.

Rubio, echoing President Donald Trump's complaints about Chinese influence over the waterway, warned that the U.S. would "take measures necessary to protect its rights" unless Panama makes immediate changes, the State Department said after Rubio met President Jose Raul Mulino.

The Panamanian leader played down the tensions but reiterated his country won't give up the canal, as his government offered other concessions to the U.S.

Mulino also said his country will not renew its participation in China's Belt and Road Initiative, making Panama the first Latin American country to do so. He added that his government will evaluate whether to pull out before its current agreement ends in 2026.

U.S. National Security Adviser Mike Waltz called that move a "step in the right direction." A U.S. official said that while positive, the move doesn't fully resolve concerns about the canal.

Asked about the situation Sunday evening, Trump told reporters that he doesn't think troops will be necessary to assure U.S. interests in the canal.

Read more in an [article from gCaptain](#).

CMA CGM Sets Peak Surcharges for Northern Europe-U.S. Containers, Surcharges Also Added for Mexico and Canada Shipments

Ocean container carrier CMA CGM has introduced peak season surcharges on a number of Northern Europe-U.S., Canada and Mexico trade lanes, effective March 1. (The carrier announced the tariffs before President Donald Trump this week said he planned to delay by 30 days tariffs on Mexico and Canada.)

The surcharges follow the slack shipping season on the trans-Pacific following Lunar New Year. There had been expectations that, concurrent with announced U.S. tariffs on China, Mexico and Canada, importers may shift some sourcing; the surcharge may also be in expectation of importers frontloading in an effort to get ahead of potential tariff threats on European countries.

Read more in an [article from FreightWaves](#).

ILA Sets Wage Review as Longshore Contract Nears Ratification Vote

The International Longshoremen's Association is expected within days to send a tentative contract with port employers to membership for ratification.

A source familiar with the process confirmed reports that the ILA's local wage scale committees are scheduled to meet this week in Florida to review the pact with the United States Maritime Alliance (USMX) covering approximately 25,000 dockworkers in container handling at 14 ports on the Eastern Seaboard and Gulf Coast.

Once the committees approve the terms of the contract, it will be sent to union members for a ratification vote. The source confirmed a time frame that could see ILA workers vote later this month and draw their first paychecks under the new pact by early March.

Read more in an [article from American Shipper](#).

International Business/Government

China Responds to Trump with Added Tariffs on Certain Products

China will levy additional tariffs on some U.S. imports starting February 10 in response to the Trump administration's tariff actions, China's Ministry of Finance announced Tuesday.

A 15% tariff will be levied on coal and liquefied natural gas, and a 10% tariff will be placed on crude oil, agricultural machinery and some cars, according to the announcement.

China said in a separate announcement that it is implementing export controls on some metals such as tungsten and tellurium.

Read more in an [article from Supply Chain Dive](#).

Trump Says He Wants Ukraine to Supply U.S. with Rare Earths

U.S. President Donald Trump said on Monday he wants Ukraine to supply the United States with rare earth minerals as a form of payment for financially supporting the country's war efforts against Russia.

Trump said Ukraine was willing, adding that he wants "equalization" from Ukraine for Washington's "close to \$300 billion" in support.

Rare earths are a group of 17 metals used to make magnets that turn power into motion for electric vehicles, cellphones and other electronics. There are no known substitutes.

Read more in an [article from the American Journal of Transportation](#).