



2<sup>nd</sup> Dec 25

Mumbai-India

Global Maritime Trade & Transport

CMA CGM prepares for full EU ETS coverage in 2026



**CMA CGM has informed customers of significant upcoming changes to the EU Emissions Trading System (EU ETS) that will affect its operations and our Energy Transition Surcharge.**

The **EU ETS** requires carriers to monitor and report **CO2 emissions** on voyages to and from EU ports, with a portion of these emissions already subject to a **cap-and-trade system** designed to accelerate emissions reductions across the **maritime sector**.

Beginning in 2026, the EU ETS will apply to **100 per cent** of our CO2 emissions — up from **70 per cent** in 2025 — and will also cover additional GHG.

This expansion will materially impact our cost structure, and we currently anticipate an approximate **43 per cent** increase in ETS surcharge levels. This estimate does not account for potential fluctuations in CO2 prices. Q1 2026 surcharge amounts for **all trades** covered by the EU ETS will be published on **1 December 2025**.

These regulatory changes underscore the EU's continued commitment to climate action and a lower-carbon future. CMA CGM noted that it will maintain full transparency as the framework evolves. (Source: Port Technology)

## Cooperation Through a Regional Maritime Forum in Southeast Asia



The Association of Southeast Asian Nations (ASEAN) is currently facing significant challenges that hinder its ability to fully realize its potential as a cooperative regional entity. Although ASEAN has played an important role in fostering economic development and trade, it has struggled to effectively address pressing security issues, such as territorial disputes in the South China Sea, the Myanmar crisis, and conflicts between member states like Thailand and Cambodia. Compounding these issues is ASEAN's reliance on consensus and principles of non-interference in internal affairs, which have limited its operational capabilities.

Given these obstacles, there is a proposal for a new initiative: the establishment of a regional maritime cooperation forum, targeting specific maritime security concerns in Southeast Asia. A potential framework for this grouping, dubbed "MANIS," includes countries such as Malaysia, Australia, New Zealand, Indonesia, and Singapore, with the possibility of expanding to include other nations like Timor-Leste and the Philippines. Although countries like Australia and New Zealand have previously collaborated through defense arrangements, this new forum aims to broaden its scope beyond military matters to include police, immigration, environmental, and intelligence issues.

Unlike ASEAN, which operates on consensus and non-interference, this maritime cooperation initiative could provide member states with a platform to engage more decisively on shared challenges without being stymied by ASEAN's limitations. This proposal does not aim to replace ASEAN but rather to complement its goals, fostering a more proactive environment for addressing maritime security.

The MANIS forum could enable collaborative activities such as regular maritime patrols, joint military exercises, and coordinated responses to threats like illegal fishing and human trafficking. By establishing common operating protocols, member states could enhance their

collective maritime security capabilities while strictly adhering to international law, particularly the United Nations Convention on the Law of the Sea.

This initiative could also pave the way for a Peacekeeping Taskforce that assesses potential cooperation in conflict zones, supporting peacekeeping efforts across the Indo-Pacific region. Crucially, the formation of MANIS presents a viable way to strengthen regional security relationships without committing to a formal security alliance.

While critics may argue that excessive regional forums already exist, a smaller, focused coalition could navigate the challenges of reaching consensus more effectively, thereby enhancing regional stability in maritime Southeast Asia. As geopolitical uncertainties grow, the need for collaborative security measures becomes increasingly critical. A regional maritime cooperation forum like MANIS offers a practical solution, empowering nations in the region to collectively address shared challenges and pursue more sustainable security cooperation.

In summary, establishing such a forum acknowledges ASEAN's limitations while capitalizing on the strengths of participating countries, fostering a more dynamic approach to maritime security in the region.

## Shanghai Port passes 46 million TEUs in October

Shanghai tightened its grip on the top of the global container rankings in October, even as growth across China's main gateways cooled to a steadier pace.

The country's **12 leading mainland ports handled a combined 22.69 million TEUs** during the month, edging up by a little over **1 per cent** from September and taking **year-to-date (YTD) volumes to around 222.6 million TEUs**.

Shanghai alone moved about **4.54 million TEUs in October**, down roughly **6.2 per cent** from September's 4.83 million TEU after an intense summer peak. Despite the month-on-month (MoM) dip, the Yangtze hub has already processed **46.07 million TEUs so far this year**, an increase of **6.5 per cent year-on-year (YoY)**.

The wider port system showed a more mixed, but still positive, picture:

- **Ningbo-Zhoushan** handled **3.80 million TEUs**, just shy of September levels, but remains one of the year's strongest performers with **10.5 per cent growth** so far.
- **Shenzhen** rebounded sharply to **3.14 million TEUs**, up **19 per cent MoM**, and now sits **6.1 per cent ahead** of last year.
- **Guangzhou** also posted a firm October at **2.32 million TEUs**, a **15 per cent monthly rise**.
- **Beibu Gulf**, China's fastest-growing regional gateway, climbed to **950,000 TEUs**, up **13 per cent** on the month and **10.5 per cent YoY**.

Northern ports registered more modest numbers:

- **Tianjin** slipped to **1.92 million TEUs**, though its cumulative total remains **3 per cent higher YoY**.
- **Qingdao** eased slightly to **2.77 million TEUs**, but is still up **7.2 per cent** for the year.

Overall, the October figures underscore a **shift in momentum towards South China**, while Shanghai continues to anchor national throughput with unmatched scale.



# Asian Maritime Industry

ADB Supports Green Port and Shipping Develop in Anhui Province, China



BEIJING, PEOPLE'S REPUBLIC OF CHINA (1 December 2025) — The Asian Development Bank (ADB) has approved a loan of CNY755.64 million (\$106.05 million equivalent) to support the development of green, smart, and resilient inland river ports and clean-energy shipping in Anhui Province of the People's Republic of China (PRC).

The [Anhui Province Green Port and Shipping Demonstration Project](#) will help transform the local port and shipping sector into a more sustainable and digitally advanced model. The project aims to reduce greenhouse gas emissions, enhance resilience to extreme weather events, and strengthen logistics connectivity to support inclusive and sustainable economic growth. It will directly benefit an estimated 1.17 million residents—including women, low-income groups, and persons with disabilities—through improved transport efficiency, reduced logistics costs, and increased employment opportunities.

"This project demonstrates the powerful impact of integrating low-carbon transport with smart and green port development," said ADB Country Director for the PRC Asif Cheema. "Aligned with both the country's goal for high-quality, low-carbon development and ADB's country partnership strategy for the PRC, 2021–2025, the project will contribute to regional and global public goods, including reduced greenhouse gas emissions and more sustainable logistics systems."

Anhui's rapid industrial growth, including its booming electric vehicle sector, has boosted freight demand. However, inland waterways and ports face capacity constraints, diesel vessel dominance, and climate hazards—such as flooding and extreme storms—that

threaten service continuity. These challenges increase logistics costs, raise emissions, and heighten the vulnerability of riverside communities.

To address these issues, the project will construct green and climate-resilient inland river ports equipped with energy-efficient loading facilities, smart port operation systems, and robust flood protection mechanisms. Clean-fuel container vessels will replace diesel-powered ships and pilot green shipping routes connecting key logistics hubs. The project will enhance emergency preparedness and promote gender-inclusive employment in port operations, with women expected to fill at least 15% of skilled positions.

The project will further strengthen institutional capacity through studies on expanding the use of clean and alternative fuels. It will develop green and smart port management guidelines and deliver targeted training on climate resilience and sustainable finance. It will also share knowledge generated with other provinces and ADB developing member countries to promote low-carbon inland waterway transport and green port development.

ADB is a leading multilateral development bank supporting inclusive, resilient, and sustainable growth across Asia and the Pacific. Working with its members and partners to solve complex challenges together, ADB harnesses innovative financial tools and strategic partnerships to transform lives, build quality infrastructure, and safeguard our planet. Founded in 1966, ADB is owned by 69 members—50 from the region.(Asian Develop. Bank

## ‘Partner port’ ties help Hong Kong navigate global trade volatility



**New deals with mainland Chinese and Chilean ports will enhance the city’s status as an international hub for finance, shipping and trading**

Hong Kong's status as a superconnector between mainland China and the rest of the world stems in no small part from its deep water port and supply chain prowess. As global trade volatility and competition erode that maritime reputation, it was encouraging to see signs of strength from new ["partner port" ties](#) unveiled recently.

City leader John Lee Ka-chiu said the partnerships with key maritime centres on the mainland and in South America "are of strategic importance" and true to Hong Kong's "character and policy priorities".

The chief executive told the 15th Asian Logistics, Maritime and Aviation Conference that the deals with China's Guangxi and Dalian ports, as well as Port San Antonio in Chile, were a "timely response" to rising geopolitical tensions and volatility in global trade policies. Noting "considerable challenges" faced by the maritime, aviation and logistics industries, Lee said responses should include market diversification as well as offsetting increased costs with "technology-enabled efficiencies".

At the separate Hong Kong Global Maritime Trade Summit, Financial Secretary Paul Chan Mo-po said he expected geopolitics to "reshape rather than weaken maritime trade flows". He said intra-Asia container volumes currently are "outpacing the global average". Industry experts have praised the port partnerships. Willy Lin, chairman of the Hong Kong Shippers' Council, said the deals were "very strategically location-specific" and a necessary response to competition in cargo sources. Lin also said the partnerships leveraged sea-rail links to extend Hong Kong's market reach.

The Dalian partnership was seen as a way to secure priority access to "green fuel", while the San Antonio deal aimed to tie up the city's "cold chain supply" of cherries. Lin estimated that 46 per cent of all Chilean cherries pass through the nation's San Antonio port, with 60 per cent riding through Hong Kong to enter the mainland.

The government has rightly focused on deepening connections with traditional as well as emerging markets. The partner port agreements are part of a wider effort by the authorities to deepen connections with both kinds of markets, with a focus on new opportunities in countries under the Belt and Road Initiative, China's plan to grow global trade.

In October, the Communist Party's proposed 15th five-year plan included consolidating and enhancing the city's status as an international hub for finance, shipping and trading. New port partnerships should be welcomed as a way to keep the city on course for a brighter future. **(Source: South China Morning Post)**



## Pirate Attacks Along Critical Southeast Asian Shipping Lane

The increasing incidents of piracy and armed robbery in Southeast Asia, particularly in the Phillip Channel linking the Malacca Strait to the South China Sea, have raised significant concerns for maritime security. A recent incident involved a cargo ship crew observing suspicious activity from their poop deck, identifying a small, unlit vessel that blended in with other traffic in this busy waterway.

Such incidents highlight the tactics used by pirates, who often masquerade as fishing boats to approach ships undetected. Maritime security experts have reported a staggering 83% rise in pirate attacks in Asia in the first half of 2025, with 95 reported incidents, primarily targeting bulk carriers for valuable items like scrap metal and spare parts.

The Malacca Strait and its adjacent waterways are crucial for global shipping, with roughly two-thirds of Australia's exports passing through this region. Disruptions due to piracy not only threaten maritime safety but also lead to increased shipping costs, which are ultimately passed on to consumers. Although the strait has not been categorized as a high-risk area by insurance bodies, experts warn that a significant rise in incidents could prompt changes in insurance classifications, further elevating costs for businesses.

The pirates operating in this area are often low-level opportunists, sometimes affiliated with organized crime syndicates, and tend to be armed but not overly violent. Analysts suggest that socioeconomic factors, including economic hardship exacerbated by the pandemic, fuel these crimes. The complexity of the geography, with numerous small islands providing cover for quick escapes, complicates law enforcement efforts. Recent arrests, however, suggest a mix of local opportunists and organized criminal operations.

Joint patrols among Malaysia, Singapore, Indonesia, and Thailand are in place to combat the threats posed by piracy, but experts argue shipping companies must also improve their security measures. Recommendations include maintaining vigilant lookout positions and reporting incidents promptly to local authorities rather than at subsequent ports, as delays in reporting limit effective responses.

Jurisdictional challenges also impede coordination among Southeast Asian nations when arresting pirates or enforcing maritime law. Experts emphasize the need for collaborative legal frameworks to effectively address piracy in these shared waters. The potential economic implications for Australia are serious; should piracy escalate, increased shipping costs could significantly impact prices for consumers.

In summary, the rise of piracy in the Phillip Channel represents not only a maritime security issue but also a concern for economic stability in the region. Addressing the root causes of piracy, improving reporting and response protocols, and fostering regional cooperation among nations will be critical to mitigating this growing threat. [Source link](#)



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## Asian Logistics Sector

### Cutting logistics costs to global average could save \$45 bln a year for Vietnam: PM



Prime Minister Pham Minh Chinh said Vietnam could save \$45 billion annually if it lowers logistics costs by around 16% to match the global average.

Speaking at the Vietnam Logistics Forum 2025 held in Danang on Saturday, the cabinet leader noted that logistics is a critical pillar for boosting national competitiveness and supporting high, sustainable economic growth.

He said logistics infrastructure has improved, especially ports, airports, and expressways, forming logistics centers in key economic regions such as Ho Chi Minh City, Hai Phong, Danang, and Can Tho. Logistics companies, about 34,000 in number, are increasingly stronger, including many active in global supply chains and applying high technologies.

"But significant shortcomings persist: logistics costs remain higher than regional peers, regional connectivity is fragile, most logistics firms are small and lack competitiveness, international transshipment hubs are yet to take shape, support policies and incentives remain weak, and digital and green logistics have yet to fully develop," the cabinet leader told the forum.

"These limitations require a shift from a mindset of 'administrative management' to 'enabling and serving development'," he stated.

The Prime Minister stressed that to support the country's goal of achieving double-digit economic growth, the logistics sector must expand even faster. "The logistics sector must grow 15% and reduce costs by around 16% to the global average - this would save Vietnam \$45 billion each year."

The government leader called for strengthened policy frameworks, stable logistics planning, streamlined procedures, and deeper decentralization to reduce costs. He urged the development of green, digital and smart logistics infrastructure, improved data connectivity, and stronger international cooperation.

Chinh also stressed the need to develop skilled human resources aligned with business and market demand and deepen regional and international logistics integration to lower costs and raise efficiency.

"The country aims to build a modern, digital and green logistics ecosystem and become one of Asia's and the world's leading logistics service centers," he added.

Vietnam's logistics services sector has grown 14-16% per year, more than twice the global rate. The domestic logistics market is estimated at \$45-50 billion, equal to about 10% of GDP and 5% of total trade value, according to Minister of Industry and Trade Nguyen Hong Dien.

Vietnam is ranked among the world's top 10 emerging logistics markets and holds the top 4 position in the region in logistics opportunity and top 5 position in ASEAN and top 40 globally in performance indexes, he told the forum.

## Asian Trade

### India's Surachita Agro sends first banana export to Dubai

Surachita Agro Producer Company Ltd has exported its first 20-ton consignment of bananas to Dubai. The shipment was carried out in partnership with Pure Planet India Pvt Ltd.

According to CEO Ratnadeep More, the group initially expected dry raisins to become its anchor commodity due to Solapur's proximity to grape-growing regions. He said, "In the beginning, we assumed dry raisins would be our anchor commodity, given Solapur's proximity to grape-growing regions. However, field surveys showed limited market demand. Even fresh grape trading didn't work in our favour. That failure pushed us to re-examine our strengths."

The shift came when the team identified expanding opportunities in banana cultivation. Farmers began adopting the banana as a primary crop, and SAPCL onboarded 350 shareholders. Daily harvesting volumes of 8 to 10 tons enabled the farmer-producer company to justify investment in a packhouse facility.

To scale further, the group applied for a processing unit under Maharashtra's SMART project (Hon Balasaheb Thackeray Agribusiness and Rural Transformation), proposing value-added products including banana powder and vacuum-fried banana chips. However, the FPC lacked stable market access. More stated, "That's where Palladium made the difference. We were struggling to find market linkages on our own. Palladium helped us navigate buyer networks, understand export requirements, and connect us with Pure Planet India Pvt Ltd. Today's export to Dubai is a direct outcome of that support."

Compiled by Dr.Sham Choughule through various sources for private circulation



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