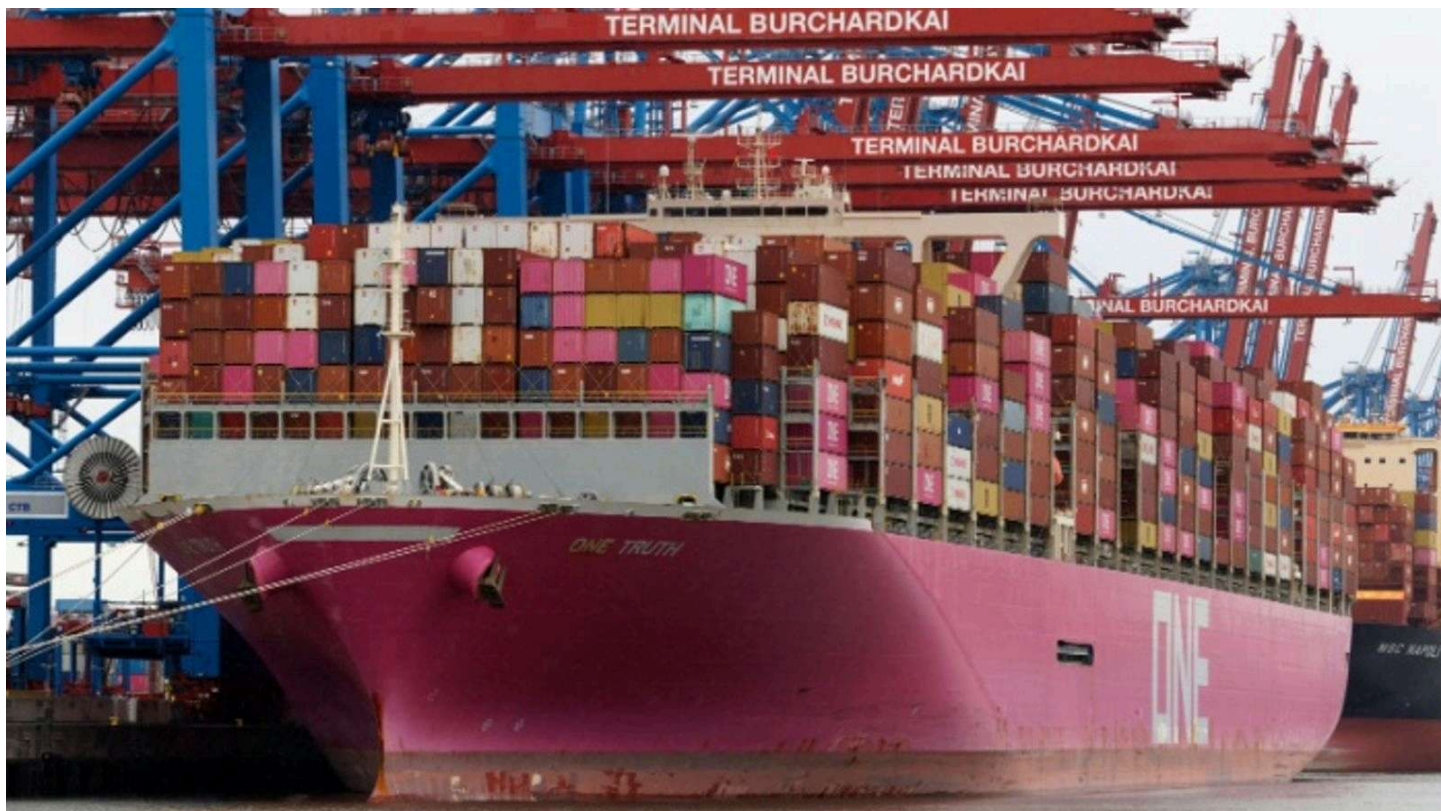


Europe ports lack buffer space to handle demand surges



Europe's three largest import gateways of Antwerp, Hamburg and Rotterdam all face "heavily disrupted operations," according to Kuehne + Nagel's SeaExplorer visibility tool. Photo credit: MartinLueke / Shutterstock.com.

[Greg Knowler, Senior Editor Europe](#) | Nov 21, 2025, 10:29 AM EST

Europe's ongoing port congestion is exposing the limited buffer capacity at both marine terminals and inland transport networks, raising the need not just for investment but also for more usage of smaller, less affected ports.

While congestion has shown signs of easing in recent months, major European ports are challenged in their ability to work through the backlogs and the shifting shipping seasons, according to Chantal McRoberts, head of advisory at Drewry Supply Chain Advisors.

McRoberts said the core underlying reason for the ongoing congestion was a lack of buffer capacity within the region's port network that created regular "congestion

cycles” that terminals battled to handle.

“Ports in Europe have been around for a long time and landslide space is limited, so when there are multiple operational issues, the system quickly gets overwhelmed and congestion builds up,” McRoberts told a *Journal of Commerce* webcast on port congestion this week.

It is a view shared by Maersk CEO Vincent Clerc, who told analysts during the carrier’s second-quarter earnings call that over the past 20 years, European terminal capacity has been added at a slower pace than the market has been growing.

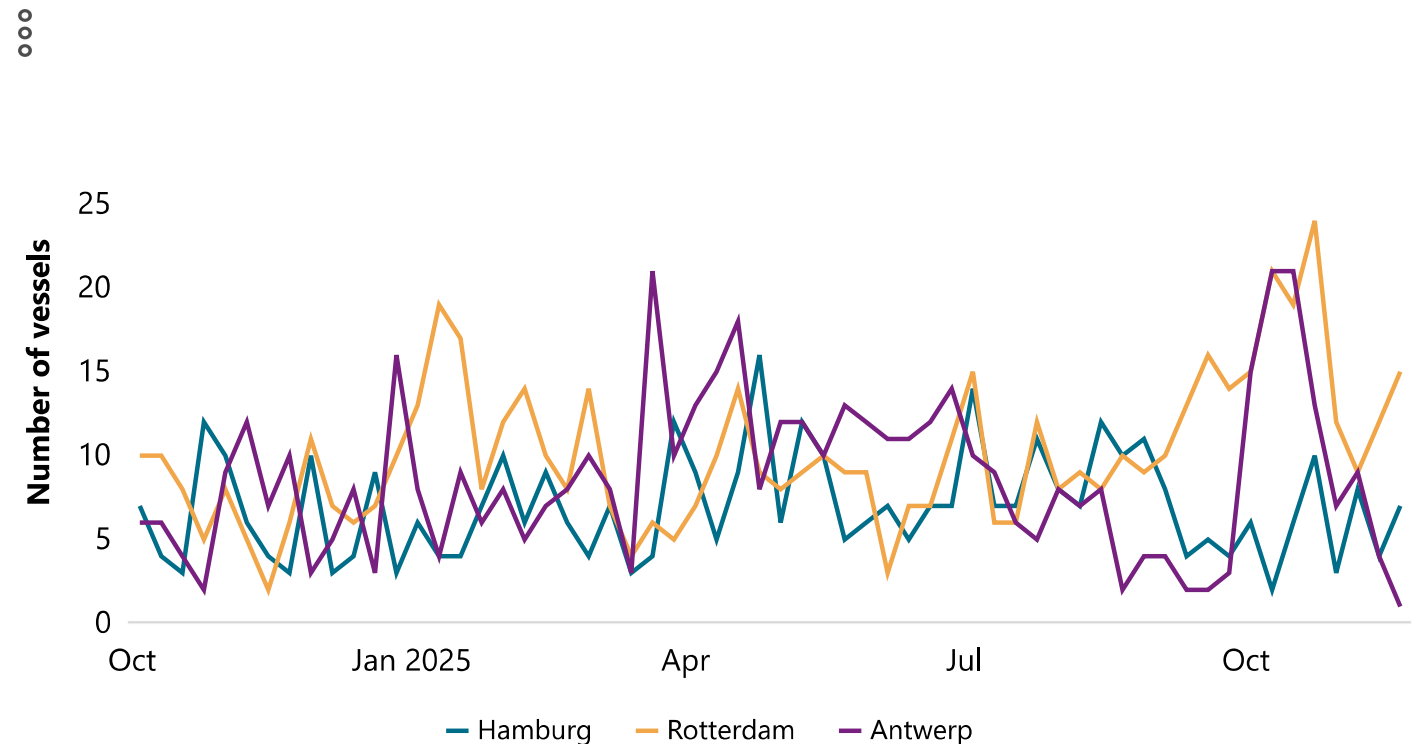
“There is a general undercapacity in ports in Europe where we're starting to feel more points of congestion that are impeding the networks,” Clerc said in August.

“Congestion in European ports is something that is likely to be with us in some shape or form for a few years.”

S&P Global Market Intelligence’s Global Port Congestion Analysis of the second quarter shows that half of Northern Europe’s ports reported year-over-year declines in port moves per hour from April through June. Vessel delays have also been erratic, as Portcast’s port harbor congestion index shows.

Volatile vessel delays spread across Europe's three largest ports

Numbers of vessel waiting at designated port harbor zone



Source: Portcast

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To address the mismatch in port capacity versus demand, Maersk's APM Terminals division is expanding its capacity in key locations such as Rotterdam and Croatia, but Clerc acknowledged that it would take time before the additional capacity came online.

CMA CGM is also expanding its port infrastructure in Northern Europe through its port division, CMA Terminals. The carrier earlier this month acquired a 20% stake in the Eurogate Container Terminal Hamburg, and is also investing in rail and river connectivity at the Lyon-Édouard Herriot Port in France.

The Port of Antwerp-Bruges, Europe's second-busiest container port, also highlighted the lack of space in its first-half results in July, noting that marine terminals were under "heavy strain" with landside space at critically low levels.

Extending lead times the only effective measure

While terminals and carriers can add capacity, there is very little shippers can do to avoid the congestion, according to McRoberts.

“Disruption and congestion have been impossible to avoid the last five years, so shippers have become more used to dealing with it,” she said. “But shippers in our Drewry benchmarking club tell us the main tactic is simply to extend lead times. Other popular strategies are to use diverse provider portfolios based on different ports and use visibility tools and platforms to see the flow of cargo through ports.”

Data from Drewry shows the regional average pre-berth waiting time was 1.7 days in week 45 beginning Nov. 3, with some ports around 10% longer. The current worst performer is Egypt’s Port Said at 3.7 days, but most European ports have shown improvement recently.

Still, Europe’s three largest import gateways of Antwerp, Hamburg and Rotterdam are all currently assessed as having “heavily disrupted operations” by Kuehne + Nagel’s SeaExplorer visibility tool.

The wave of congestion this year was triggered by the restructuring of carrier alliances in February and the emergence of Gemini Cooperation, which McRoberts said was accompanied by service changes and vessel redeployment.

“Later in the year, this was compounded by the fluctuating Rhine River water levels, canceled sailings and various labor disruptions across Europe. All of this contributed to increasing port congestion across the region,” she said.

Strikes in Rotterdam by container lashing companies and a go-slow by sea pilots in Antwerp created container bottlenecks in October, and labor disruptions are set to continue later this month in Belgium, Portugal and Italy. Belgium’s rail network will stop as workers walk out from Nov. 23 to Nov. 26; strike action by Portugal’s Port Authorities staff will impact all major Portuguese ports from Nov. 21 to Dec. 13, and a national strike will be held in Italy on Nov. 28 and 29.

While strikes were major disruptors to European terminal handling operations, McRoberts highlighted structural issues that contributed to the ongoing congestion.

“We have seen fewer port calls combined with an increase in average vessel sizes as alliances and services have consolidated in Europe,” she told the *Journal of Commerce* webcast. “We have also seen longer pre-berth waiting times, often paired with extended terminal stays and driven by larger vessels with higher load factors.”

Seasonal patterns changing

Shifting seasonal patterns are also not doing Europe's container terminals any favors.

"In 2025, peak seasons have been messed about all year," McRoberts said. "The disruption caused by US tariff announcements [on European imports] created bubbles of volume and surges in demand, which in turn created congestion in peak seasons or periods where we wouldn't normally expect strong demand. If you overlay that with labor disputes and changing river levels, it's like a domino effect that causes pockets of congestion."

Looming over the Asia-Europe trade is the potential return of carriers to Red Sea and Suez Canal transits. The bunching of vessels as those taking the shorter route through the Suez catch up to vessels sailing around Africa is expected to create significant bottlenecks in Europe and Asia. But McRoberts said there would not be an overnight return to the Red Sea.

"We will see a gradual phase-in period, so there will be an opportunity for shippers to think about how to plan their cargo needs with carriers and their inventory carrying costs and their networks," she said.

Analysts expect carriers to operate a dual-route strategy for some time once the Red Sea is deemed safe to transit, keeping both the around-Africa sailings and the Suez Canal route in their schedules.

When it comes to finding solutions to Europe's persistent port congestion, there are no short-term answers, according to McRoberts. She said increasing terminal capacity and expanding operations was one solution, but it was a long-term approach.

"We know there is new capacity coming onstream in Rotterdam and some upgrades underway in Antwerp and Hamburg, but they will take time to implement and will not bring short-term relief," she said.

McRoberts said smaller-scale capacity gains were coming from investment in productivity improvements or in data sharing, but they were having a minimal impact and did not generate an incremental improvement in buffer capacity.

"That doesn't help when ports hit those periods of congestion, and that's the fundamental problem with the European port network — it simply has insufficient buffer capacity," McRoberts said.

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