

# Hapag-Lloyd saw China bookings drop hard after US enacted tariffs



*West Coast ports anticipate a tough May in the immediate wake of Trump's tariff threats against China. Photo credit: The Image Party / Shutterstock.com.*

**Michael Angell, Senior Editor | Apr 23, 2025, 3:05 PM EDT**

Ocean carrier Hapag-Lloyd says it pivoted to smaller ships rather than blanking trans-Pacific voyages in order to manage the sharp decline in US import bookings following the Trump administration's implementation of hefty tariffs against China.

Following President Donald Trump's April 9 unveiling of "reciprocal" tariffs against China and subsequent escalations of those tariffs, Hapag-Lloyd said its container bookings from China to the US fell 30%, a spokesperson for the carrier said in a statement to the *Journal of Commerce*, confirming reporting from Reuters.

The number of canceled bookings largely mirror those that another ocean carrier saw, while forwarders and non-vessel-operating common carriers (NVOs) said over half of

their China bookings were canceled in the aftermath of the tariffs. At the same time, Hapag-Lloyd said bookings from Southeast Asia “are currently going up significantly” after Trump paused reciprocal tariffs against other trading partners for 90 days.

The sudden decline in bookings triggered ocean carriers to cancel trans-Pacific voyages at a rate not seen since the start of the COVID-19 pandemic in March 2020.

But Hapag-Lloyd said it and Gemini Cooperation partner Maersk maintained the alliance’s trans-Pacific service by using smaller ships instead of canceling voyages.

“Gemini is not blanking any sailings and not canceling any voyages — but in some cases using smaller vessels to adapt to changing demand,” Hapag-Lloyd said.

## Capacity shift

Vessel tracking data from Sea-web, a sister company of the *Journal of Commerce* within S&P Global, shows Hapag-Lloyd shifting some capacity into the trans-Pacific.

The 9,954-TEU Nhava Sheva Express, which had been calling European and US East Coast ports in the first quarter of 2025, is now en route from Busan to Tacoma as part of Gemini’s WC4 service to the Pacific Northwest. Likewise, the 6,921-TEU Missouri Express is now part of Gemini’s WC5 service from Ningbo to Los Angeles after it served the trans-Atlantic trade.

The Wall Street Journal reported Wednesday morning that the White House is considering slashing the tariffs on China, in some cases by more than half, to de-escalate the trade war with Beijing. But whether shippers quickly resume bookings is unclear as West Coast ports still expect volumes to drop in the coming weeks.

Inbound shipment data from the Port of Los Angeles shows that container volumes during the first full week of May will drop 34% from a year earlier, indicating how quickly shippers canceled bookings from China in early April.

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