

Logistics Update		Date	August 15 2025																													
Terms are conditions																																
Please note that this form is for informational purposes only and is a high-level status of shipping around the world																																
The details below are not representation of the shipping practices at Manitoba Liquor and Lotteries and is intended for informational purposes only.																																
Manitoba Liquor and Lotteries is not liable for details presented in this document and the information below is subject to change without notice.																																
If you require details on your purchase orders, please request a status update from a Manitoba Liquor and Lotteries representative.																																
Freight may be subject to consolidation and may be delayed if insufficient freight is not available at the time of product availability.																																
Logistics Heat Map - (Rolling 6-month tracking)																																
Ship Point	May '25	June '25	July '25	August '25	September '25																											
Western Canada																																
Eastern Canada																																
Australia																																
California / USA																																
Europe																																
New Zealand																																
South Africa																																
South America																																
Legend Stable/No issues Stable/Minor issues Watching Warning/Some Issues Major issues		Average Transit Times Port to Port (April 1st - Current) <table> <tr><td>Argentina</td><td>41 Days</td></tr> <tr><td>Australia</td><td>37 Days</td></tr> <tr><td>Chile</td><td>37 Days</td></tr> <tr><td>France</td><td>14 Days</td></tr> <tr><td>Germany</td><td>17 Days</td></tr> <tr><td>Ireland</td><td>18 Days</td></tr> <tr><td>Italy</td><td>24 Days</td></tr> <tr><td>New Zealand</td><td>21 Days</td></tr> <tr><td>Portugal</td><td>12 Days</td></tr> <tr><td>South Africa</td><td>54 Days</td></tr> <tr><td>Spain</td><td>19 Days</td></tr> <tr><td>United Kingdom</td><td>10 Days</td></tr> <tr><td colspan="2">Transit time Port to Winnipeg DC</td></tr> <tr><td colspan="2">21-28 Days</td></tr> </table>			Argentina	41 Days	Australia	37 Days	Chile	37 Days	France	14 Days	Germany	17 Days	Ireland	18 Days	Italy	24 Days	New Zealand	21 Days	Portugal	12 Days	South Africa	54 Days	Spain	19 Days	United Kingdom	10 Days	Transit time Port to Winnipeg DC		21-28 Days	
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General Notes

1-April - Israel: War Risk Surcharge

In consideration of the war situation in Israel, vessel insurers have imposed an additional war risk premium surcharge on all vessels calling Israeli ports. Therefore, shipping lines announced the introduction of a War Risk Premium Surcharge with immediate effect on all cargo to and from Israel. The surcharge will apply to new bookings as well as for cargo already onwater transit and is subject to change with or without notice.

Red Sea Basin Countries - 27 May 2025 - The Red Sea region continues to present ongoing safety challenges for vessels. Ocean carriers are expected to continue to re-route vessels via the Cape of Good Hope. Last year shipping lines invoked Force Majeure clauses and implemented additional charges on freight rates and contracts. Hillebrand Gori implemented an Emergency Cost Recovery Surcharge from January 1, 2024 to cover these extra costs. We all remain committed to securing shipping space and containers, ensuring operational continuity without compromising security. Customers can access shipment information via myhillebrandgori.com.

Red Sea Basin countries - 13 June 2025 - Escalating Middle East conflict triggers major shipping disruptions for alcohol industry. The escalating conflict in the Middle East continues to disrupt global shipping routes. A return to Red Sea transit is not expected anytime soon, marking a lasting disruption to traditional logistics flows in the sector. Port activity in the area has dropped significantly, and access to certain ports may become increasingly difficult in the coming days and weeks. At the same time, port congestion may rise at alternative hubs as global shipping continues to adapt to this prolonged rerouting.

Red Sea Basin countries - 25 Jun 2025 - Currently, all ports in the region remain open, operations are continuing, and there is no restriction from carriers at the moment. Vessels continue to transit the Strait of Hormuz. We will continue to monitor this situation. We are looking for contingency solutions in case of further escalations and disruptions.

Mexico - Manzanillo Port Delays - 2 Jun 2025 - The custom workers strike at Manzanillo port in Mexico has not been reactivated, but the port is still seeing reduced staffing and low productivity, in particular with customs inspections which can be delayed up to 2 days. Expect delays to clear any backlogs and resume normal operations.

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Mexico - Manzanillo Port Delays - 30 Jun 2025 - The custom workers strike at Manzanillo port in Mexico officially ended, but the port is still dealing with backlog and reduced staffing is impacting overall productivity. In particular, customs inspections which can be delayed up to 2 days. Expect delays to clear any backlogs and resume normal operations.

Mexico - Manzanillo Port Delays -21 Jul 2025 - Manzanillo continues to see congestion with an average of 5 days of delay for vessel wait times. Port continues to manage backlog from customs worker strike and operational impacts from severe weather.

Western Canada

No major misses at this time

Eastern Canada

No major misses at this time

9 July 2025 - The seasonal drop of water levels on the St. Lawrence River is reducing operational tonnage deployed on services calling Montreal. Ocean carriers are implementing low water surcharges on Montreal port calls starting in July 2025.

13 August 2025 - Due to rail car supply and vessel arrival bunching, import dwell times are averaging 5 days but expected to improve over the coming week. The seasonal drop of water levels on the St. Lawrence River is reducing operational tonnage deployed on services calling Montreal. Ocean carriers are applying low water surcharges on Montreal port calls as of July 2025

California/US
Currently no issues in California or Shipping from the USA to Manitoba 28 Feb 2025 - Potential Tariff Rates on US Alcohol 4-March, due to Tariff period delays this notice will be enforced - "4-Feb, Effective Tuesday, MBLL will be directed to pull American products off the shelves of liquor marts and will stop ordering American alcohol, the premier noted. " - 4-March - The Government of Canada is imposing 25% tariffs on imports of certain goods from the US . The Canada Border Services Agency (CBSA) is collecting the tariffs in the form of a surtax 19 Jun 2025 - The Government of Manitoba has no update on removing US product embargo.
Argentina / Chile
Argentina - 16 Jun 2025 - The International pass between Mendoza and the Chilean ports of San Antonio and Valparaiso has re-opened following a multi-day closure from bad weather. Transit is resuming but anticipate some delay from the backlog of trucks to cross. Note as of the beginning of this month, winter hours will be in effect for transportation, limiting the transit to only 12 hours per day. Anticipate delays and additional charges for late/early arrival costs, storage, and demurrage/detention for shipments moving from Mendoza to Chilean ports. Argentina - 30 Jun 2025 - The International pass between Mendoza and the Chilean ports of San Antonio and Valparaiso has reopened and is currently operating on winter schedules, where transit is limited to only 12 hours per day. The pass is frequently disrupted due to winter storm and road conditions, typically from May through September. There were 10 days this June where the pass was closed. Anticipate delays and additional charges for late/early arrival costs, storage, and demurrage/detention for shipments moving from Mendoza to Chilean ports. Argentina / Chile - 1 Aug 2025 - Since 31st July due Tsumani Alert in Pacific Coast Port in Chile were closed. Today we are waiting updates from carriers and Port authorities, but vessels' stackings have not been opened. Most of this weekend bookings are being rolled. Since 31st July International road connecting Mendoza to Chilean Ports has been closed due to bad weather. Transit has been interrupted completely. It will not return to normal until better weather conditions, when the authorities inform the road is completely cleaned and operative again. Pass probably will be closed till Sunday 3rd August.
Australia
Australia port services are normal. No major delay at source.
New Zealand
New Zealand port services are normal. No major delay at source.

Europe

Most European ports nearing normal volume

Germany - 2 Jun 2025 - Bremerhaven - Terminals are experiencing congestion and delays. Vessel schedule changes are impacting gate operations. Rail connections to/from German ports have been disrupted and extensive construction work is planned for this summer which will impact service schedules.

Germany - 23 Jun 2025 - Bremerhaven - Terminals are operational but experiencing congestion and significant capacity reductions are expected during the summer months. Rail connections to/from German ports have been disrupted and extensive construction work is planned for this summer which will impact service schedules. Summer truck restrictions will be in place on trucks over 7.5 on key routes Saturdays from July 1 to August 31, 2025.

Germany - 13 August 2025 - Bremerhaven - Terminal capacity remains high and labor availability is short during the summer months. Rail connections to/from German ports have been disrupted and extensive construction work which will impact service schedules. Summer truck restrictions in place on trucks over 7.5 on key routes Saturdays until the end of August.

Germany - 2 Jun 2025 - Hamburg - Port operations operating with delays over the past few weeks, in addition to a public holiday May 29, 2025. Rail service connection delays to and from Northern German ports and planned construction work for this summer. Low water surcharges in effect for barge transport. Delivery restrictions still in place and interim storage charges may be incurred until container terminal delivery can be completed.

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Germany - 13 August 2025 - Hamburg - Yard utilization remains high and rail service connections are delayed to and from Northern German ports due to major construction work. Summer truck circulation restrictions in place on trucks over 7.5 on key routes Saturdays until the end of August.

Belgium - 26 Mar 2025 - A general strike has been announced for Belgium that will impact rail, road and airport transport and access to Antwerp terminals. Note that congestion and influx of cargo continues to impact productivity at Antwerp terminals, in particular DP World terminals. Import container and evacuation has been prioritized over new deliveries. Berth priority for export and trans-shipment container movements has restricted diverted cargo from nearby ports. Expect delays and additional waiting times and associated charges.

Belgium -15 May 2025 - A national strike is planned for May 20, 2025 and will add to the current congestion, delays and critical yard capacity at terminals. Expect delays and additional waiting times and associated charges.

Belgium -12 Jun 2025 - Belgium's major trade unions have announced a new national strike for Wednesday June 25, 2025. It is not clear how the strike will impact operations at Antwerp, but the port is already dealing with congestion and backlog and critical yard capacity at terminals. Expect delays and additional waiting times and associated charges.

Belgium - 30 Jun 2025 - Antwerp port operations were disrupted by the national strike last week on June 25, 2025. Container vessel arrivals were delayed, barge and inland waterway scheduled services were also disrupted. Terminal and trucking operations are dealing with a backlog that will take some time to clear. Expect delays, additional waiting times and associated charges.

Belgium - 13 August 2025 - Terminals experiencing an average of 2-4 day delay for vessel arrivals. Terminal congestion remains high. Expect delays, additional waiting times and associated charges.

Italy - 23 Jun 2025 - Multiple rail infrastructure projects will have an impact on intermodal shipments throughout the country. In particular Genoa is expected to see heavy disruption during the month of August as work is conducted on the Genoa rail junctions. Road transport for heavy trucks (container and standard cargo trucks) will be not be permitted on the weekends in July August, starting either on Saturday morning or on Fridays as early as 2PM. New regulation reducing truck driver wait times from 2 hours to 90 minutes has also come into effect.

Italy - 21 July 2025 - Multiple rail infrastructure projects will have an impact on intermodal shipments throughout the country. In particular Genoa is expected to see heavy disruption during the month of August as work is conducted on the Genoa rail junctions. Road transport for heavy trucks (container and standard cargo trucks) will be not be permitted on the weekends in July August, starting either on Saturday morning or on Fridays as early as 2PM. New regulation reducing truck driver wait times from 2 hours to 90 minutes has also come into effect.

Netherlands - 12 May 2025 - Terminals are still experiencing yard congestion at Rotterdam. Delta II Terminal operations have seen delays due to labor shortages. High capacity and berth utilization at APM and RWG Terminals.

Netherlands - 23 Jun 2025 - Delta II Terminal operations have seen delays due to labor shortages. High capacity and berth utilization at ECT, APM, and RWG Terminals. A labor agreement was reached on June 16, 2025 between APM Terminals and port unions ending work slowdown actions.

Netherlands - 13 August 2025 - Terminals are still averaging a 2-4 day berthing delay for arriving vessels. High yard density and congestion at terminals for landside and trucking operations.

Sweden - 12 June 2025 - The dockworkers union of Sweden has issued several strike notices affecting various ports from June 19 to June 26, 2025. Gothenburg, Halmstad and Malmö will strike June 23 and June 24 and additional action and dates have been announced for Helsingborg, Piteå and Sundsvall ports.

Russian Sanctions still in place for exporting from Russia

Ukraine is still under an act of war declaration so shipping from Ukraine to Canada is on hold

South Africa

No updates at this time

*This document is intended reference only. This can be shared with stakeholders.