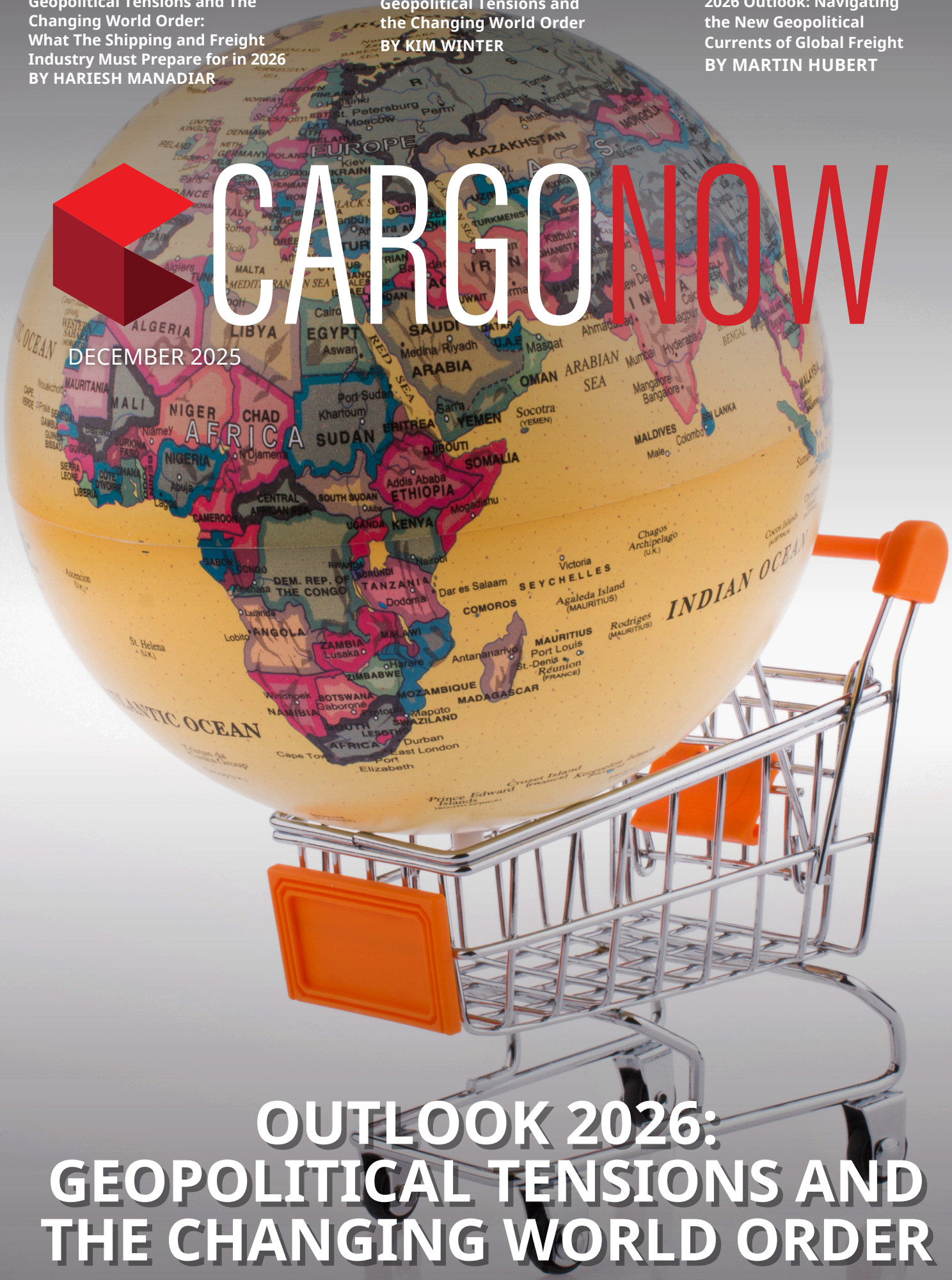
Geopolitical Tensions and The Changing World Order: What The Shipping and Freight Industry Must Prepare for in 2026
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2026 Outlook: Navigating the New Geopolitical Currents of Global Freight
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FROM THE EDITOR

Natasia Jerah

As we close the year and inch toward 2026, I'm struck by how much the world of logistics now feels like Christmas shopping in a crowded mall: everyone moving in different directions, choices shifting by the minute, and surprises at every turn (well, my version of Christmas shopping at least).

- Geopolitics has become the invisible hand rearranging our trade flows
- Traditional routes we once relied on are no longer guaranteed
- Sanctions, chokepoints, and digital-sovereignty rules now influence freight flows as much as capacity or cost

But just like the holidays, this season of change also brings opportunity. Resilience is now the core of strategy: stronger regional depth, diversified routing, and compliance readiness. Think of it as preparing for a festive feast: you hope every ingredient arrives on time, but you keep a backup plan just in case.

In this issue, we gather the insights, and strategies (and hopefully share a bit of good cheer!); to help steer the industry confidently into 2026. On that note, have a fantastic year-end with family, friends and CargoNOW reads!

Natasia Jerah
Editor-In-Chief
CargoNOW

Geopolitical Tensions and The Changing World Order: What The Shipping and Freight Industry Must Prepare For in 2026

Hariesh Manadiar





Global trade has always operated within a fine balance between commerce and politics. In 2025, that balance tilted more visibly than at any time in the last two decades.
The growing intersection of geopolitics, protectionism, and national security priorities is now redefining how global supply chains are structured, financed, and operated.
For the shipping and freight industry, this is not just about tariffs or sanctions anymore. It is about a complete recalibration of how goods move, where they move, and who controls the lanes of movement.
As we look ahead to 2026, it is clear that logistics strategies can no longer be built solely around efficiency and cost. Resilience, risk diversification, and geopolitical awareness have become the new fundamentals.

A global system under strain

In recent years, freight professionals have had to navigate a volatile mix of trade wars, sanctions, and maritime security concerns. The continued

- Uncertainty in U.S.–China relations,
- War in Ukraine,
- Instability in the Middle East, and
- New blocs emerging in the Global South

have collectively eroded the predictability that once underpinned trade planning. United Nations Conference on Trade and Development (UNCTAD) recently warned that global shipping is entering a period of “chronic volatility,” citing new tariffs, conflict spillovers, and increased voyage distances as key disruptors. For example, the Red Sea crisis alone has altered global routing patterns and significantly increased insurance premiums and bunker costs.
Even as freight rates moderate from pandemic highs, the underlying fragility of the system has not eased. Carriers and logistics operators face rising uncertainty about which trade corridors will remain stable, and which could face sudden disruption.

1. Trade policy is now an instrument of power

One of the most important shifts going into 2026 is the growing use of trade policy as a geopolitical lever. The U.S., European Union, and China are all deploying tariffs, export controls, and compliance restrictions as tools of influence rather than purely economic instruments. According to ING’s “Global Shipping: Navigating the Waves of Geopolitics,” global trade volumes could decline

by as much as 3% in 2026 under a sustained protectionist scenario. For logistics providers, which translates into more complex routing, fluctuating demand, and regulatory unpredictability.
The freight industry must accept that what used to be market-driven disruptions are now politically driven ones. For example, a single policy shift on technology exports can instantly reshape cargo flows for entire sectors like semiconductors or renewables. The need for real-time visibility into regulatory and tariff changes has never been higher.

2. Chokepoints and maritime security will dictate costs

Maritime chokepoints have once again become geopolitical flashpoints. The Bab el-Mandeb Strait, the Strait of Hormuz, and even the Panama Canal have seen their risk profiles increase. Attacks in the Red Sea by Houthi forces have pushed many carriers to reroute vessels around the Cape of Good Hope, a detour that adds 10–14 days to the average voyage and increases fuel consumption by roughly 40%.
While longer voyages may be seen as a temporary solution, the reality is that these diversions are becoming normalised. They also clash directly with global sustainability goals, particularly the IMO's net-zero targets, as longer routes raise emissions per voyage. Shippers are already factoring in risk-based surcharges and insurance adjustments. The key takeaway for 2026 is that route security and cost stability will move in opposite directions, the safer the route, the more expensive the service.

3. The rise of regionalisation and 'friend-shoring'

Globalisation is not disappearing, but it is transforming. Production networks are becoming regional, not purely global. "Friend-shoring" and "near-shoring" are shifting manufacturing footprints closer to end markets, often within trusted political alliances.
A 2025 study published on arXiv found that supply chains remain deeply tied to China despite diversification attempts, but regional nodes in India, Southeast Asia, and Eastern Europe are strengthening.
For the logistics industry, this transformation means more intra-regional shipping demand, new port-development opportunities, and the emergence of new freight corridors. The traditional East-West trade lanes will continue to lose some dominance as North-South and intra-Asia routes gain prominence.
However, regionalisation also brings new challenges: smaller trade volumes per route, less vessel utilisation efficiency, and a growing need for agile network design and data-driven optimisation.

4. Freight metrics to watch in 2026

Several leading indicators will reveal how these geopolitical tensions will play out in real terms across global freight markets.

1. **Spot freight rates:** Industry analysts expect container spot rates to decline by up to 25% in 2026 compared with 2025, but they caution that this could mask deeper structural shifts, not necessarily an easing of pressure.
2. **Transit distances:** UNCTAD data shows that the average global voyage length increased from 4,831 miles in 2018 to 5,245 miles in 2024, mainly due to rerouting around risk zones. This trend is expected to continue if geopolitical risks remain high.
3. **Insurance costs:** War-risk and piracy-related premiums are already rising sharply in the Middle East and parts of East Africa. For many carriers, these surcharges now rival bunker adjustment factors in terms of cost impact.
4. **Trade-volume distribution:** ING Think forecasts modest growth of 2–3% globally but warns that most of it will come from regional or intra-bloc trade rather than traditional intercontinental lanes.

5. The operational response: what logistics leaders must do

The events of the last three years have reinforced a hard truth: the next disruption will not wait for the current one to stabilise. For 2026, freight and logistics executives must anchor their strategies on three core principles: visibility, adaptability, and collaboration.

- **Build multi-scenario planning into every operation**

Scenario planning can no longer sit in PowerPoint slides.. It must be an active process inside every TMS and routing engine.. Companies should model alternate corridors, including cost implications for each risk zone and fuel scenario.

- **Treat compliance and trade policy as strategic functions**

Sanctions, export-control lists, and tariff adjustments can appear overnight. Having internal teams or digital tools tracking these shifts in real time will prevent costly detentions, fines, or contractual disputes.

- **Diversify sourcing and routing**

Single-lane or single-market dependencies have become untenable. Procurement, manufacturing, and logistics planning must evolve in parallel to enable supplier and route diversification. This is not just a resilience measure; it is a competitive advantage.

- **Integrate sustainability with resilience**

Longer voyages due to rerouting create higher emissions, which will clash with decarbonisation targets. Carriers and forwarders must therefore balance environmental commitments with geopolitical realities through tools like slow-steaming, alternative fuels, and carbon offset partnerships.

- **Invest in real-time visibility**

Data is the currency of resilience. Integrating AIS vessel tracking, port-throughput analytics, and predictive disruption alerts can give operators a head start on reacting to crises. Knowing earlier often makes the difference between a delay and a disaster.



6. A shifting world order and the freight industry's role

The emerging multipolar order will redraw the map of global trade. We will see more "trade clubs," where nations within certain blocs establish privileged logistics corridors, customs harmonisation, and mutual recognition of standards. This fragmentation will not necessarily reduce trade but will make it more compartmentalised. For freight companies, this opens both risk and opportunity. Those that can build networks aligned with emerging blocs, and maintain compliance with multiple regulatory regimes, will have a strategic edge. Africa, Southeast Asia, and Latin America are likely to be the biggest beneficiaries of this re-ordering, attracting investment in ports, inland logistics, and industrial parks as businesses seek alternative supply routes.

Looking ahead: 2026 and beyond

The outlook for 2026 is not about pessimism, it is about preparedness. Volatility is now part of the normal operating environment, but that also means resilience can become a differentiator. The freight and shipping sectors must accept that geopolitics is now a permanent variable in trade planning. Leaders who can interpret global developments early and translate them into operational strategy will drive the next phase of growth.

Shipping has always been about more than moving goods, it is about connecting economies, cultures, and opportunities. As the world order shifts, our industry stands once again at the crossroads of commerce and geopolitics. The choices made now will define who leads the next chapter of global trade.



Hariesh Manadiar

Hariesh Manaadiar is a subject matter expert in the field of shipping, freight, logistics and trade active in the industry for over 35 years. Hariesh shares his knowledge and experience through his Shipping and Freight Resource which he founded in 2008. He has a Masters in Shipping and Logistics, is a Fellow of the Institute of Chartered Shipbrokers, qualified in Digital Trade Strategy and Digital Supply Chain Management and holds a Diploma from the London School of Journalism.



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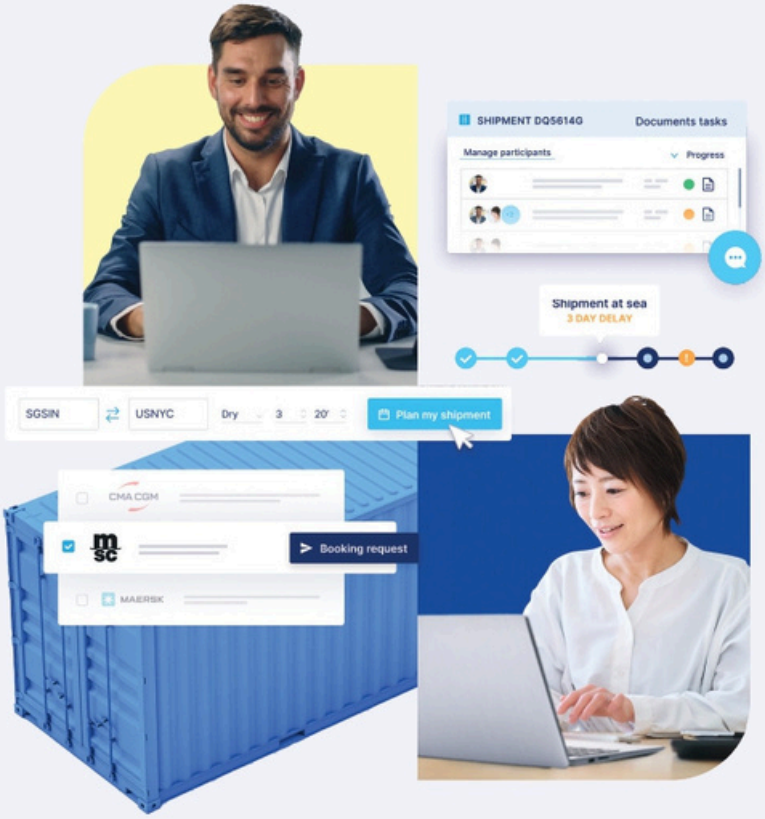
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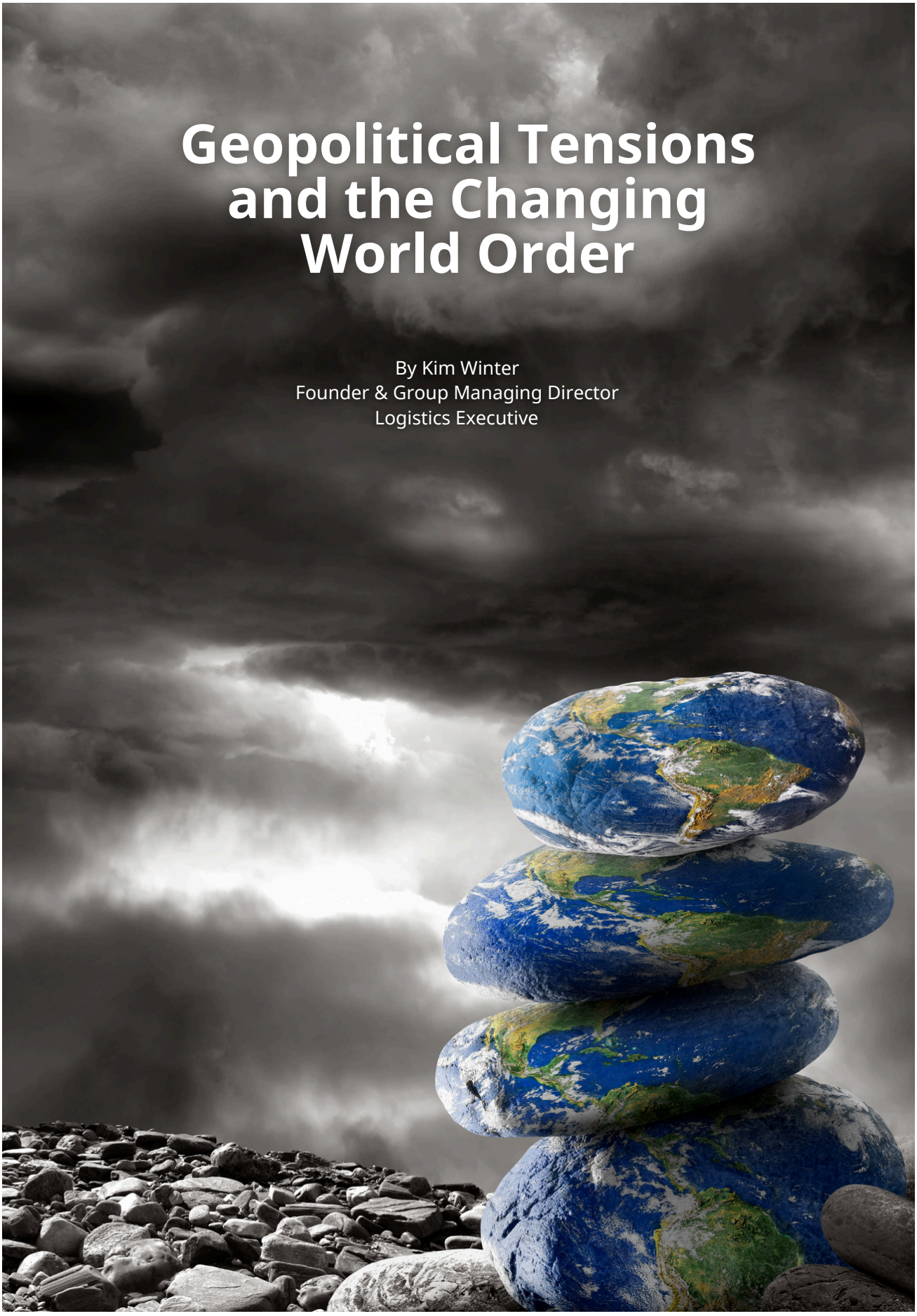
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Geopolitical Tensions and the Changing World Order

By Kim Winter
Founder & Group Managing Director
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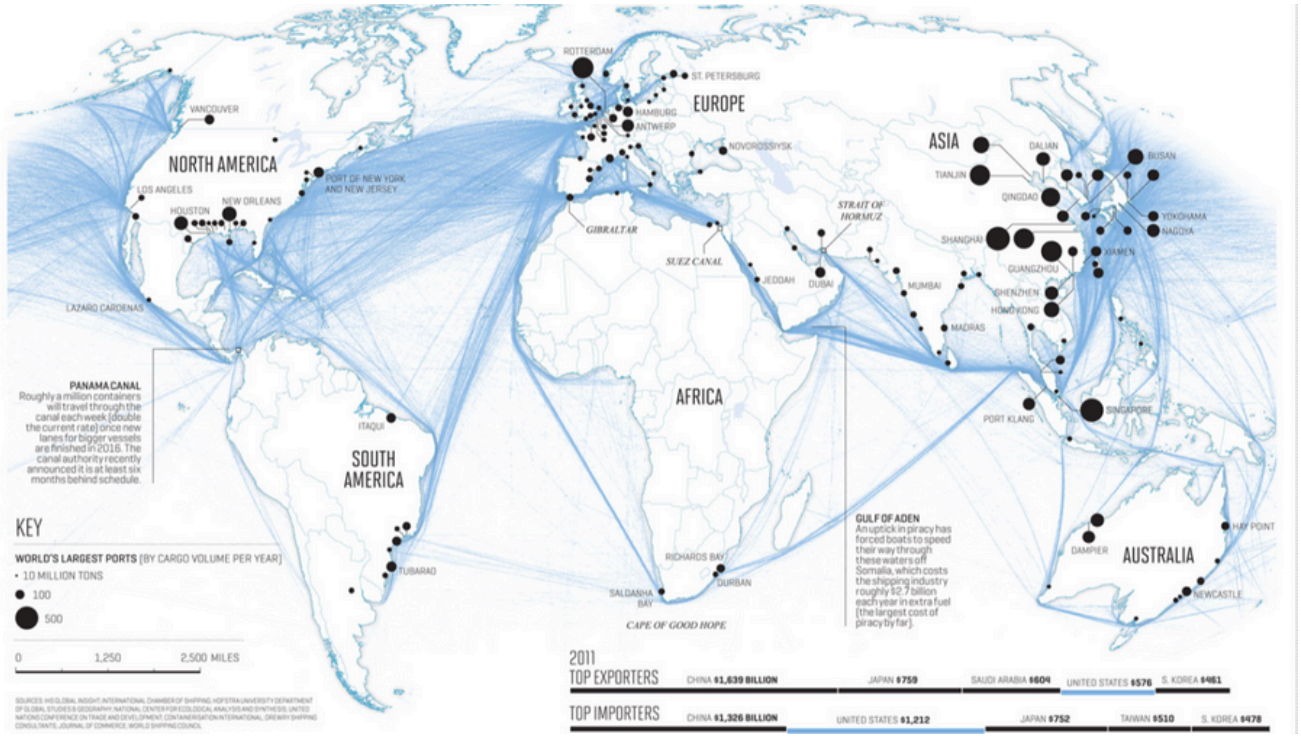


Figure 1– Changing Trade Corridors, 2025.
Traditional East–West routes are giving way to regional and South–South corridors as geopolitical fragmentation reshapes logistics flows.
Source: McKinsey Global Institute / Global Maritime Hub 2024.

Introduction: The World at an Inflection Point

As 2026 approaches, the global economy faces an inflection point. The post-pandemic recovery has been slow, uneven, and punctuated by shocks, energy crises, regional conflicts, and the re-emergence of trade protectionism. What once seemed like an interconnected, frictionless global marketplace now looks more like an archipelago of competing blocs, each defined by political alignment, energy security, and technological sovereignty.

For the logistics and air cargo industry, these geopolitical shifts are not abstract. They are redefining trade flows, reconfiguring supply chains, and reshaping the rules of ngagement in global commerce. To understand the world of 2026, we must first recognise the drivers behind this transformation and their implications for global logistics networks, investment, and strategic resilience.

1. From Globalisation to Fragmentation

1.1 The End of the "Flat World"

The optimism of early globalisation, a worldglobalisation a world powered by open trade and efficient global supply chains has faded. Rising protectionism, sanctions regimes, and strategic decoupling between major economies have fractured that ideal. The global order is no longer about integration but selective interdependence, where countries engage only in areas that serve their strategic or security interests. The U.S.–China rivalry has become the central axis around which this fragmentation spins. Washington's restrictions on advanced semiconductor exports, Beijing's assertive Belt and Road expansion, and the rise of new regional coalitions such as BRICS+ and the Indo-Pacific Economic Framework mark a redefinition of influence. The result is a multipolar trade system where alignment and ideology shape logistics flows as much as efficiency and cost once did.

1.2 Supply Chains Under Pressure

Geopolitical friction has translated directly into the physical world of logistics:



Figure 2 – Emerging Trade Blocs and Regional Integration.
Trade within blocs is expanding faster than inter-bloc trade, supporting the regionalisation trend that is redefining supply-chain geography.
Source: Statista / Brookings Institution 2024.

- Maritime chokepoints such as the Red Sea and the Taiwan Strait are now seen as strategic vulnerabilities.
- Energy corridors, particularly in the Middle East and Central Asia, have become geopolitical bargaining chips.
- Technology and data infrastructure the invisible veins of supply-chain intelligence are increasingly viewed through the lens of national security.

Corporations that once optimised for cost are now designing for resilience, redundancy, and control. The mantra of "just-in-time" has evolved into "just-in-case."

2. The New Geography of Trade

2.1 Rise of Regional Blocs

Trade blocs are reasserting their importance. The European Union, despite internal divisions, is pushing for supply-chain sovereignty and green trade policies. North America's USMCA is strengthening regional supply resilience, while ASEAN and the African Continental Free Trade Area (AfCFTA) are positioning themselves as collective growth zones amid global uncertainty.
This regionalisation reflects a pragmatic calculus: shorter supply chains, lower geopolitical risk, and increased ability to respond to local market shifts. It is no coincidence that air freight operators and third-party logistics providers are now prioritising intra-regional capacity in Asia, Africa, and the Middle East.

2.2 The "South-South" Axis

An equally important shift is the strengthening of trade corridors between developing economies. India–Middle East–Africa trade is surging; Latin America–Asia routes are becoming increasingly viable. This "South-South" axis represents a redistribution of global trade weight, where emerging economies collaborate to offset the dominance of traditional Western markets. For logistics executives, these emerging routes present both opportunity and complexity: differing customs regimes, infrastructure gaps, and varying levels of political stability. But they also signal where growth will occur in the next decade **beyond the old centres of gravity**.

3. Energy, Security, and the Economics of Conflict

3.1 Energy as a Strategic Weapon

Energy remains the defining currency of global power. The Ukraine conflict exposed Europe's dependency on Russian gas, while the Middle East continues to hold strategic leverage through oil production and transport routes. At the same time, the transition to renewables is reshaping

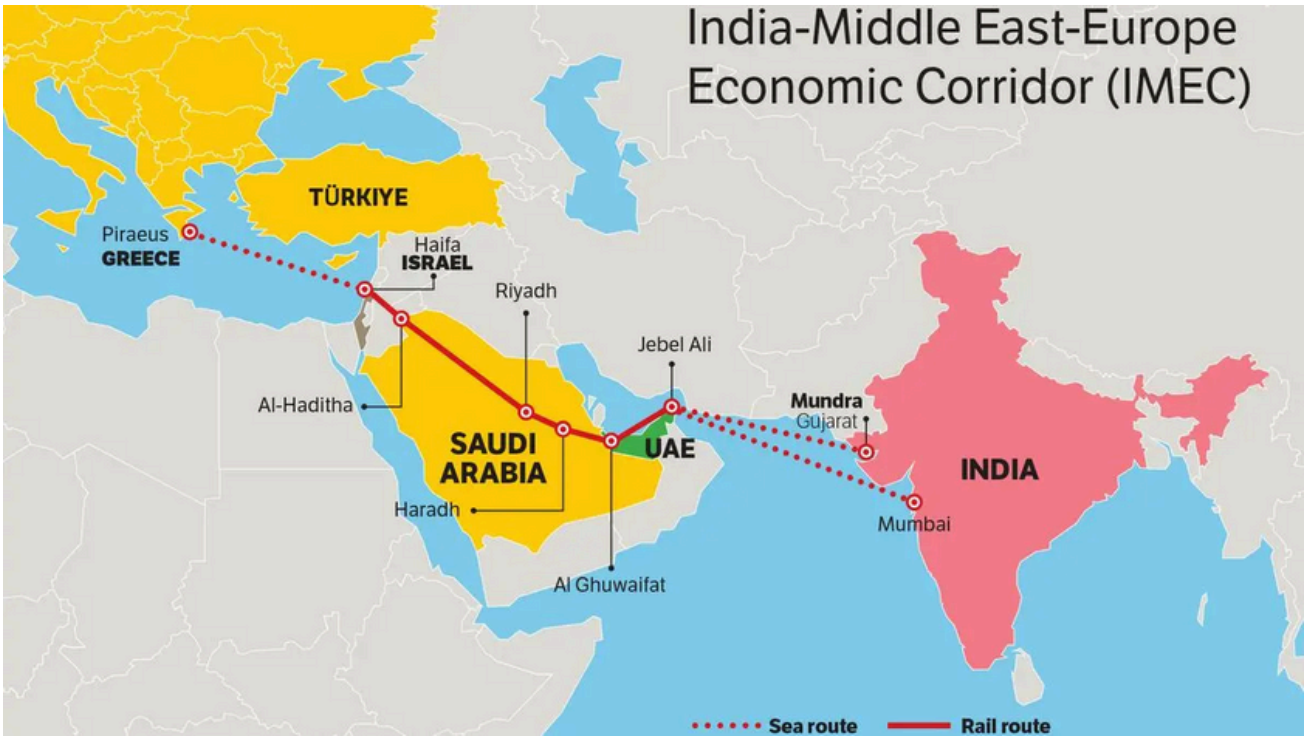


Figure 3– Emerging Trade and Energy Corridors.
The India–Middle East–Europe Corridor symbolises a strategic re-routing of global supply chains, linking South Asia to Europe through Gulf hubs.
Source: Government of India / Economic Times 2025.

geopolitical priorities creating new dependencies on lithium, cobalt, and rare earth minerals concentrated in Africa, South America, and China. The logistics challenge is stark: new commodities, new corridors, and new chokepoints. The shift from fossil fuels to energy transition materials means **bulk transport is giving way to critical mineral logistics** smaller volumes, higher value, and tighter security requirements.

3.2 Sanctions, Controls, and the New Trade Bureaucracy

Economic sanctions have become a policy instrument of first resort. Yet their proliferation has introduced a dense layer of compliance complexity.

The number of sanctioned entities globally has more than tripled since 2020. For freight forwarders, airlines, and shipping lines, this translates into:

- Heightened due diligence across customers and suppliers.
- Increased documentation and screening costs.
- Greater exposure to legal and reputational risk.

The modern logistics executive must now think like a compliance officer. The penalties for missteps even unintentional can cripple a business's access to global markets.

4. Technology and Data: The New Battleground

4.1 Digital Sovereignty and the Splintering Internet

In 2026, digital infrastructure is as strategic as oil pipelines once were. Nations are asserting "digital sovereignty" demanding local data storage, encryption standards, and oversight of AI systems. This has birthed a splintered internet, with multiple digital ecosystems (U.S., China, EU) operating under distinct legal regimes.
For logistics providers, this fragmentation complicates global visibility platforms and cross-border data integration. A shipment moving from Shenzhen to Frankfurt might transit through three digital governance zones, each with its own compliance rules.

4.2 AI, Automation, and Control

Artificial intelligence and automation are reshaping logistics at every level predictive maintenance, cargo yield management, and digital freight matching. However, in an era of heightened geopolitical rivalry, control over algorithms and data flows is as political as it is commercial. Expect governments to increasingly regulate AI models used in logistics, demanding transparency on data sources, bias, and ownership. The industry will need to balance innovation with accountability in an environment where technology is both an enabler and a flashpoint.

5. The Strategic Reordering of Air Cargo and Logistics

5.1 Shift in Corridors and Capacity

Air cargo has always mirrored the contours of trade. In the emerging world order, **traditional East–West flows** are fragmenting. While Asia–Europe and Trans-Pacific routes remain vital, growth is migrating to **North–South corridors** connecting Africa, the Middle East, and South Asia.

Airlines are recalibrating fleet deployment to meet these new realities. Narrow-body freighters are replacing wide-bodies on regional routes; multi-stop networks are gaining traction; and joint ventures with regional carriers are proliferating.

5.2 Infrastructure and Investment Reallocation

Geopolitical uncertainty is steering investment toward neutral hubs geographies perceived as politically stable and commercially open. The UAE, Saudi Arabia, Singapore, and Türkiye are capitalising on this positioning. They offer advanced infrastructure, liberal trade regimes, and connectivity across both Western and Eastern trade systems.

Meanwhile, African logistics is entering a transformative phase, fuelled by new port, airport, and rail developments. For investors, Africa represents the next logistics frontier high risk, but equally high reward.

5.3 The Compliance and Ethics Imperative

The more fragmented the global order becomes, the greater the premium on trust, transparency, and governance. Cargo operators will increasingly be judged not just on performance, but on their ethical conduct adherence to sanctions, human rights standards, environmental policies, and data protection.

In this sense, compliance has evolved from a back-office necessity into a competitive differentiator.

6. Business Strategy in a Divided World

6.1 From Global Scale to Regional Depth

Global players must rethink what “scale” means. Success in 2026 will not come from stretching networks thin across the globe, but from achieving depth and adaptability within regions. Companies that can localise operations, manage currency and regulatory volatility, and flex capacity across zones will hold the advantage.

6.2 Building Strategic Resilience

Resilience is no longer a theoretical concept; it’s a boardroom metric. This includes:

- Scenario planning for geopolitical shocks.
- Diversified sourcing to mitigate single-region exposure.
- Strategic stock positioning across bonded and free-trade zones.
- Supplier risk scoring that accounts for political alignment, not just financial health.

The era of static networks is over. The future belongs to those who can reconfigure supply chains as fluidly as trade policies change.

6.3 The Human Factor

Amid the geopolitics and algorithms, people remain the decisive asset. Logistics leaders must cultivate adaptive leadership the ability to interpret complex geopolitical signals, communicate clearly across cultures, and maintain operational discipline in uncertainty.

Training and talent development will become a critical differentiator as the industry competes for a generation of professionals

capable of navigating the grey zones of a divided world.

7. Looking Ahead: Outlook 2026

The year ahead will test both the resilience and the imagination of global business. We can anticipate several defining trends:

1.Persistent Geopolitical Fragmentation: Regional alliances will harden, and cross-bloc trade will continue to decline.

2.Accelerated Regionalisation: Asia, Africa, and the Middle East will see stronger intra-regional trade growth as companies de-risk global exposure.

3. Energy Transition Logistics: Demand for minerals, components, and renewable energy infrastructure will reshape freight patterns.

4. AI and Automation Maturity: Operational visibility and capacity optimisation will improve dramatically, though regulatory oversight will tighten.

5.Compliance-Driven Operations: Companies that integrate governance, ethics, and transparency into their business DNA will outlast those that treat it as an afterthought.

Conclusion: A New Compass for a New Era

Geopolitical tensions are not a temporary disruption; they are the defining feature of the emerging world order. The illusion of a single, integrated global economy has given way to a landscape of competing systems, values, and interests.

For the logistics and air cargo sector, this is both a challenge and an invitation. Those who cling to old models of globalisation will struggle. Those who adapt by investing in regional depth, technology, compliance, and talent will thrive.

2026 will not be the year the world "returns to normal." It will be the year when we acknowledge that the new normal is multipolar, managed, and contested and that agility, trust, and foresight are the new currencies of success.



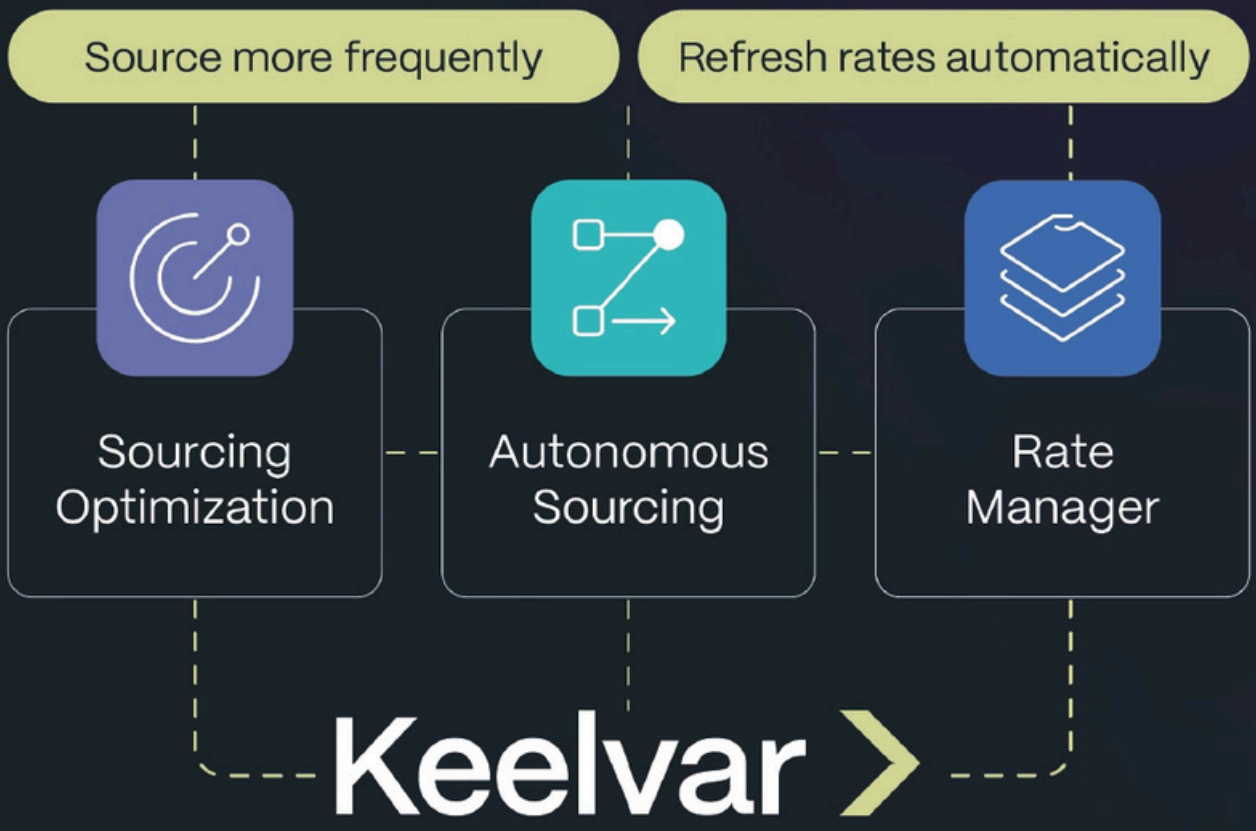


Kim Winter
Founder & Group Managing Director
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He is a Board member over a dozen companies throughout APAC, India and the Middle East, a New Zealand citizen, he holds formal resident status in Australia, Hong Kong and the UAE and is an international representative for several key UAE Government entities.

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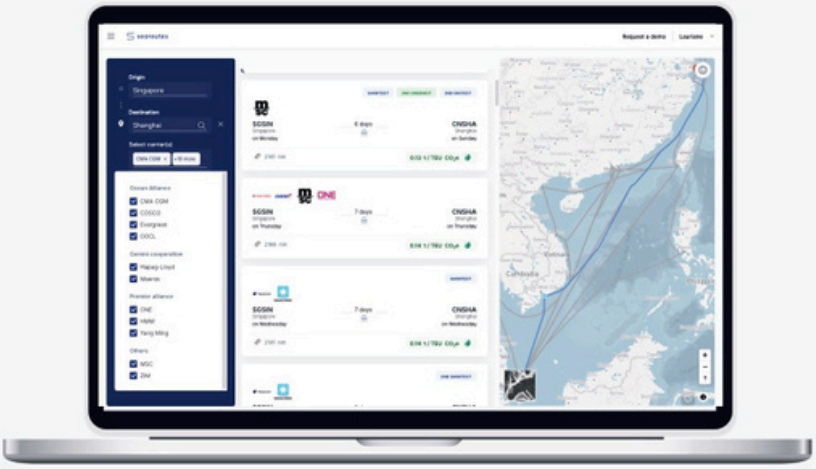
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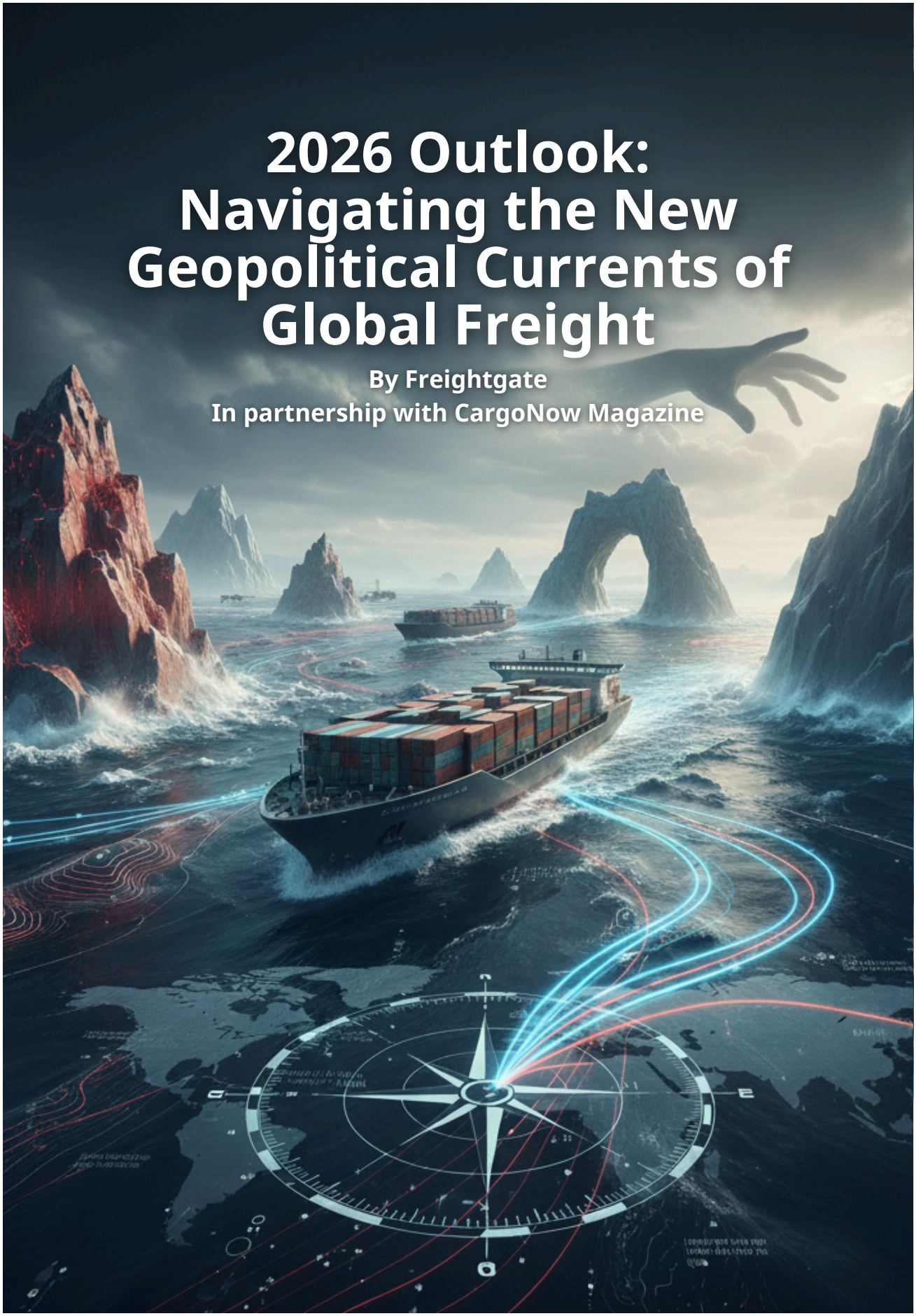
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2026 Outlook: Navigating the New Geopolitical Currents of Global Freight

By Freightgate
In partnership with CargoNow Magazine





The freight industry is no longer simply responding to demand surges, carrier schedules, or port congestion. In 2026, logistics professionals face a reshaped strategic terrain where geopolitics is as critical as geometry. The major trade lanes of yesterday are being reframed by power-bloc ambitions, regional corridor building, and regulatory overhaul. For supply-chain and freight-operations leaders, the key question is: how do we manage freight flows when the rules, routes and risk-horizons are shifting beneath our feet?
Below are five pivotal geopolitical trends set to redefine freight operations in 2026 — followed by recommended actions to help build resilient, opportunity-ready supply chains

1. U.S.–China Tensions & Trans-Pacific Trade Reconfiguration
The longstanding friction between the People's Republic of China and the United States of America has entered a phase of uneasy truce rather than resolution. A 12-month trade pause offers short-term relief, yet does not remove structural uncertainty. For freight professionals: container-spot rates on the Trans-Pacific are forecast to decline in 2026 despite the truce, as U.S. shippers pull forward inventory and carriers reposition capacity.

Implications for freight/logistics operations:

- Trans-Pacific corridors may see continued weak utilisation and downward pressure on rates — less margin for carriers, tighter service reliability.
- Inventory draw-down in the U.S. means fewer back-to-back imports, but also increased risk of re-loading once the truce ends.
- Forwarders and shippers will need to monitor tariff reversals, export-control shifts and forced supply-chain diversification (China +1). Research shows that despite rhetoric on reshoring, the functional links between the U.S. and China remain deep.

Prediction for 2026:
By mid-2026, expect at least one abrupt policy reversal (e.g., reinstated tariffs or export controls) that will force a sudden freight-capacity realignment. Carriers using the Asia-North America route will execute "lean-back" repositioning of vessels in H1, and H2 will see a scramble for incremental

capacity to emerging sourcing hubs (Vietnam, India, Indonesia).

2. Rising Regional Trade Blocs & Alternative Corridors

The global trade map is fragmenting into regional blocs and corridor-networks. Initiatives such as the Regional Comprehensive Economic Partnership (RCEP), the United States-Mexico-Canada Agreement (USMCA) and the African Continental Free Trade Area (AfCFTA) are setting new rules, localising trade patterns. At the same time, large infrastructure programmes such as the Belt and Road Initiative (BRI) and the emerging India-Middle East-Europe Corridor (IMEC) are opening alternative freight-paths.

Implications:

- Expect new rail-sea hybrid corridors (e.g., India-Middle East-Europe) to shorten transit times and bypass maritime chokepoints.
- Logistics providers will need to build capability across multiple blocs — each with unique customs-, sanctions- and digital-platform regimes.
- Blocs will push for localised content and regional sourcing — impacting global shipping volumes and modal mix.

Prediction for 2026:

One key sea-rail corridor (likely IMEC) will become commercially viable for the first time, diverting up to 5% of Asia-Europe container volumes away from the traditional Asia-Mediterranean-North Europe route. Freight providers who have pre-positioned assets and strong local partnerships in the India-Middle East axis will capture a disproportionate share of early adopter volumes.

3. Energy Security, Fuel Costs & Freight-Chain Cost Volatility

The logistics industry's fuel and energy-chain dependency is no longer just operational—it's geopolitical. Regionally, refining constraints, biofuel policy shifts and trade in LNG are increasingly shaping freight costs. For example, refinery closures in Australia and New Zealand have forced carriers to rely on imported diesel from Singapore, raising fuel-surcharge volatility.



Implications:

- Carriers and inland logistics operators must treat fuel cost as a geostrategic risk: fuel supply disruption = freight cost spike
- Freight contracts will require more dynamic fuel-surcharge models, hedging positions and alternative fuel-capable assets.
- Regional energy-shocks (e.g., Middle East, Russia) will ripple through freight routes via higher bunker-fuel and diesel costs.

Prediction for 2026:
At least one major inland carrier or 3PL will publicly cite "fuel sourcing disruption" as a primary reason for a margin shortfall in 2026, leading to a shift in contract terms: expect surge clauses tied to refined-fuel imports and energy-policy events. Logistics vendors with access to alternative-fuel assets (LNG, bio-diesel) will command premium contracting terms.

4. Maritime Chokepoints, Route Risk & Alternative Transits
Maritime chokepoints such as the Suez Canal, Strait of Malacca and Panama Canal remain critical vulnerabilities. Analyses show disruptions in these corridors—whether from political violence, piracy or climate-driven water constraints—are increasingly the norm, not the exception.

Implications:

- Freight-operators must embed "alternative-route readiness" into planning: knowing transit-cost delta, insurance impact, lead-time variation.
- Container lines and forwarders will introduce redundancy via land-bridges, rail-corridors and multi-modal back-up routes.
- Premium routing may become the default for high-value cargo with higher insurance/volatile-route premiums.

Prediction for 2026:
A disruption (e.g., Red Sea/Bab el-Mandeb escalation or Panama-Canal water-shortage) will force one major carrier to impose "route-risk surcharge" on trans-Atlantic shipments for the first time in a decade. The premium for bypassing a chokepoint via rail-sea route will rise by ~10-15 % by year-end.

5. Compliance, Digital Sovereignty & Carbon Border Regimes
In 2026 freight and logistics firms will face not only physical but regulatory shifting terrain. Two major areas:
a) Technology & data-sovereignty: Global logistics platforms are subject to export-controls, data-localisation regimes (e.g., China, India) and supply-chain tracking mandates. Firms must prepare for "platform fragmentation" by region, meaning tech-stack complexity will rise.
b) Carbon-border mechanisms: The EU Carbon Border Adjustment Mechanism (CBAM) will move from reporting to full-financial liability in 2026. For freight providers arranging goods for EU importers, embedded-emissions data and certificate-surrendering become part of the service-offering.

Implications:

- Logistics providers must build emissions-tracking into shipment routing, modal-choice, fuel mix analysis.
- Contracts need to anticipate data-requests around carbon footprints and destination-region compliance.
- Technology vendors, cross-border platforms and data-governance specialists will become strategic partners, not just service providers.

Prediction for 2026:
By Q3 2026, more than 20 % of EU-destined freight invoices will include a "carbon-certificate" component, and freight-forwarders without verified carbon-reporting capabilities will lose market share to those that can integrate emissions-compliance into their services.

Actionable Recommendations for Freight and Supply-Chain Professionals

1. **Diversify trade-route portfolios** — don't rely on a single sourcing region or shipping corridor. Use scenario-maps for alternate sourcing (China +1), routing (rail-sea corridors) and modal-switch strategies.
2. **Embed "geopolitics in procurement"** — freight contracts should include clauses for tariff-spikes, export controls, fuel-shock, route-diversion and carbon-certificates.
3. **Strengthen visibility and intelligence** — real-time tracking of route-risks (chokepoints, regional conflicts), fuel-source constraints, regulatory shifts (CBAM, tech-sovereignty).
4. **Invest in digital and emissions-compliance capability** — partner early with tech-providers who can track embedded-emissions, provide data-dashboards and support modal-selection for low-carbon logistics.
5. **Build strategic reserves and redundancy** — inventory buffers, secondary routes, alternative hubs to absorb disruptions. Routinely stress-test your "what-if" scenario for chokepoint closures, fuel-spikes and export-ban roll-outs.

Conclusion: Freightgate's Forward-Looking Guidance

In 2026 the freight industry enters a phase of managed instability — not chaos, but structural change where geopolitical and regulatory shifts are the baseline. For freight and logistics executives this means the strategy playbook must evolve: from operational efficiency to strategic resilience.

At Freightgate, we advise logistics leaders to shift from asking "What might disrupt my route?" to "How does this new world order shape my route-design, contract terms and technology-stack?" The firms that succeed will not simply move cargo more cheaply—they will move cargo smarter, having designed systems around the new verbs of geopolitics: bloc-alignment, corridor-diversification, emissions-compliance and data-sovereignty.

Prepare now. Diversify routes. Invest in predictive systems. Build service offerings that integrate compliance and resilience. The freight chains of 2026 will reward the forward-thinking —not the reactive.

Freightgate remains committed to supporting the market with deep analysis, strategic advisory and operational readiness as we navigate what's next.



Martin Hubert
CEO at Freightgate

Martin Hubert is the CEO of Freightgate, a global leader in cloud-based logistics solutions. With over two decades of experience driving digital transformation in freight management, Martin is a recognised innovator in applying technology to create more resilient, efficient, and sustainable supply chains. He is a frequent contributor to industry conferences and publications, shaping the dialogue on the future of logistics and global trade.

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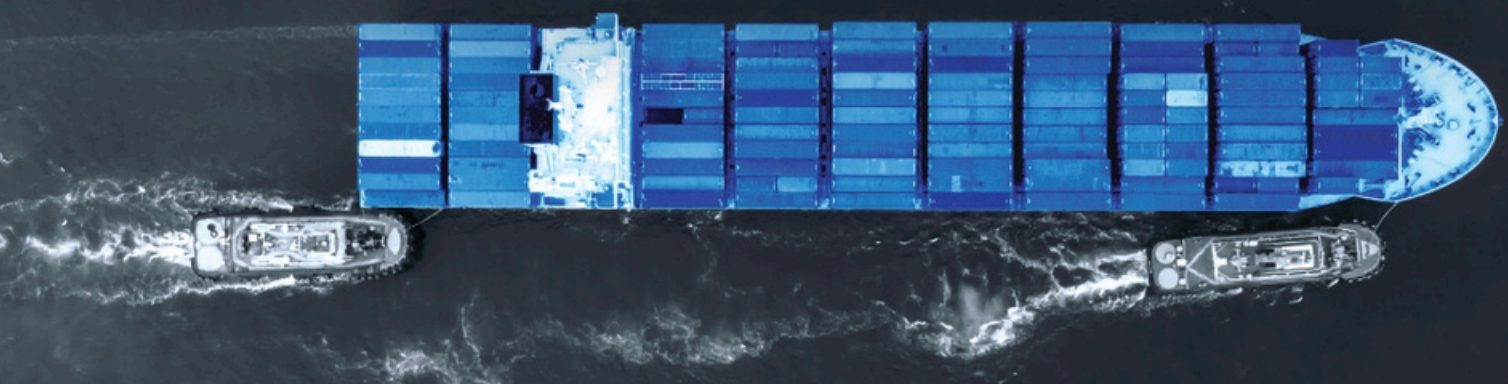
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Talk to our experts

Converging Forces: Human, Digital and Circular Supply Chains Uniting People, Technology & Sustainability for Resilient and Accountable Global Trade



By Dr. Raymon Krishnan
President of The Logistics & Supply Chain Management Society (LSCMS)

As early as the 3rd quarter of each year, I work with our respective Board members on the focus and theme for LogiSYM in the coming work year. For 2026 our focus is on People, Technology & Sustainability for Resilient and Accountable Global Trade.

Resilience is a word that is being bandied about quite a fair bit recently, but my sense is that not many leaders and logisticians grasp the full sense and importance of this in their supply chains.

The events of November 2025 serves as a stark, undeniable reminder of the fragility underpinning our highly optimised ASEAN supply chains. As severe flooding triggered by the rare Equatorial Cyclone Senyar and Tropical Storm Koto impacted Thailand, Indonesia, Malaysia, and Vietnam, the resulting backlogs and delays are more than just a temporary blip; they are a critical stress test of our regional logistics resilience.

We are now navigating the immediate aftermath, and we are all now acutely aware that Climate Shocks Are Now a Core Supply Chain Risk and Not a Black Swan Event

In 2024 alone, climate-related disruptions affected more than $2.3 trillion worth of global trade, according to international risk analysts. By 2030, over 60% of global ports are projected to face regular climate-induced operational shutdowns. The severe flooding that swept across Thailand, Indonesia, Malaysia, and Vietnam in November 2025 proves that these projections are no longer theoretical, they are operational reality.

Ports across the region are now gradually resuming operations after the rare equatorial Cyclone Senyar disrupted maritime and inland logistics networks. In Thailand, Songkhla Port is working toward normalisation, yet restricted road access and alternative routings are adding up to six hours of additional transit time. In Indonesia, landslides and flooding across Sumatra have severely impacted inland logistics. Malaysia's ports and freight corridors faced widespread operational delays, while Vietnam's maritime sector continues to recover from Tropical Storm Koto and flash floods.

This is not merely a weather story. It is a strategic wake-up call.





The Anatomy of the Disruption

- **Infrastructure Paralysis:** In Thailand, the normalisation of operations at ports like Songkhla is encouraging, but road access remains limited, forcing alternative routings that add a crippling six hours to transit times. This immediate pressure on first and last-mile connectivity cripples predictability.
- **Archipelagic Vulnerability:** Indonesia saw widespread logistical impacts from landslides and flooding across Sumatra, exposing the inherent vulnerability of supply chains reliant on inter-island shipping and local infrastructure in the archipelagic context.
- **Regional Congestion:** The immediate fallout is visible in our major hubs. We are seeing significant **vessel bunching** in Singapore, with waiting times of 12 to 36 hours, and similarly high congestion at Port Klang (26-hour waits). This compounding effect means regional delays quickly become international bottlenecks, penalising everyone.
- **The Air Freight Bottleneck:** Whilst air freight provides an urgent alternative, the sudden surge in demand instantly constrains capacity when coupled with the year-end volume uptick, making it a viable but expensive option only for critical, high-value cargo.

The Long-Term Reset: Building Climate Resilience Logistics

This episode of simultaneous, widespread disruption, driven by rare but intensifying weather events demands that we integrate climate resilience into the core of our logistics strategy for 2026 and beyond.

- **Investing in Robust Infrastructure:** Government and private investment must be channelled into **climate-proofing** critical infrastructure. This means elevating port access roads, reinforcing coastal protection measures, and investing in advanced, autonomous monitoring systems to provide early warnings for vulnerable road and rail networks.

- **Standardised Regional Contingency Plans:** We need a formal, ASEAN-level framework for crisis response. This framework should detail how neighbouring ports and logistics nodes can quickly absorb diverted cargo when a primary hub is incapacitated. This ensures that the recovery of one country does not come at the cost of crippling congestion in another.
- **Digital Data Standards:** The fragmentation of data exacerbates the recovery effort. We must accelerate the adoption of standardised digital data exchange across borders, ensuring that disruption information from customs clearance adjustments to port status is universally available and machine readable

Supply chains designed purely for efficiency will struggle in a world increasingly defined by disruption. Resilience, redundancy, climate intelligence, and multimodal agility must now sit at the core of network design not as optional upgrades.
The question is no longer if disruption will happen but whether your supply chain is truly built to absorb it.



Dr. Raymon Krishnan President of The Logistics & Supply Chain Management Society (LSCMS)

Dr. Raymon Krishnan is the President of the Logistics & Supply Chain Management Society (LSCMS) with over 25 years of experience in global supply chain and logistics operations. He has held senior roles across multinational companies and advises on supply chain strategy, compliance, and trade. A regular speaker at industry events, Dr. Krishnan is widely recognised for his leadership in advancing supply chain professionalism in the Asia-Pacific region.

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- Online articles
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