



Market Report 9/2025



Company Capabilities

Our mission is to deliver peace of mind. In the ever-evolving global supply chain, we find a way when others can't: creating more personalized, sustainable, and resilient solutions to the challenges that our customers face.

OIA Global provides end-to-end supply chain management, including **3PL** services, **4PL** supply chain orchestration, **contract logistics** (warehousing and distribution), innovative **packaging solutions**, **raw materials management**, and several advanced **technology solutions** for shipment visibility and inventory management.

By leveraging these comprehensive and scalable solutions, exceptional customer support, and a truly global network, we go above and beyond to find the path to success for every customer.



1,100+
Employees

60+
Offices

30+
Countries

Case Studies

Contact OIA

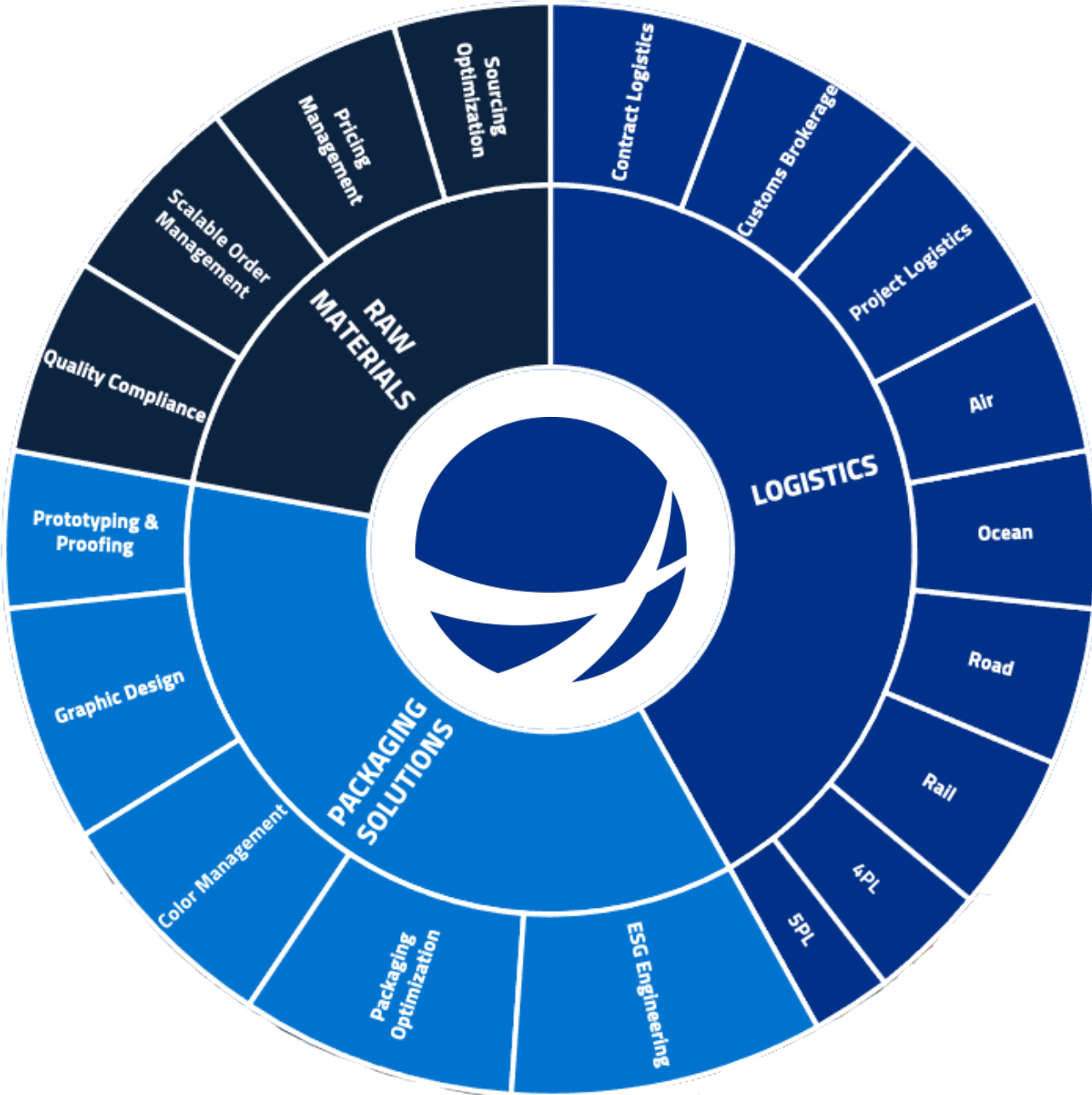


Table of Contents

Market Trends

MARKET OVERVIEW	1-3
▪ South Africa's recovery plan.....	2
▪ South Korea invests in U.S. shipbuilding capabilities.....	3

MERGERS/ACQUISITIONS	10
-----------------------------------	-----------

Trade & Compliance

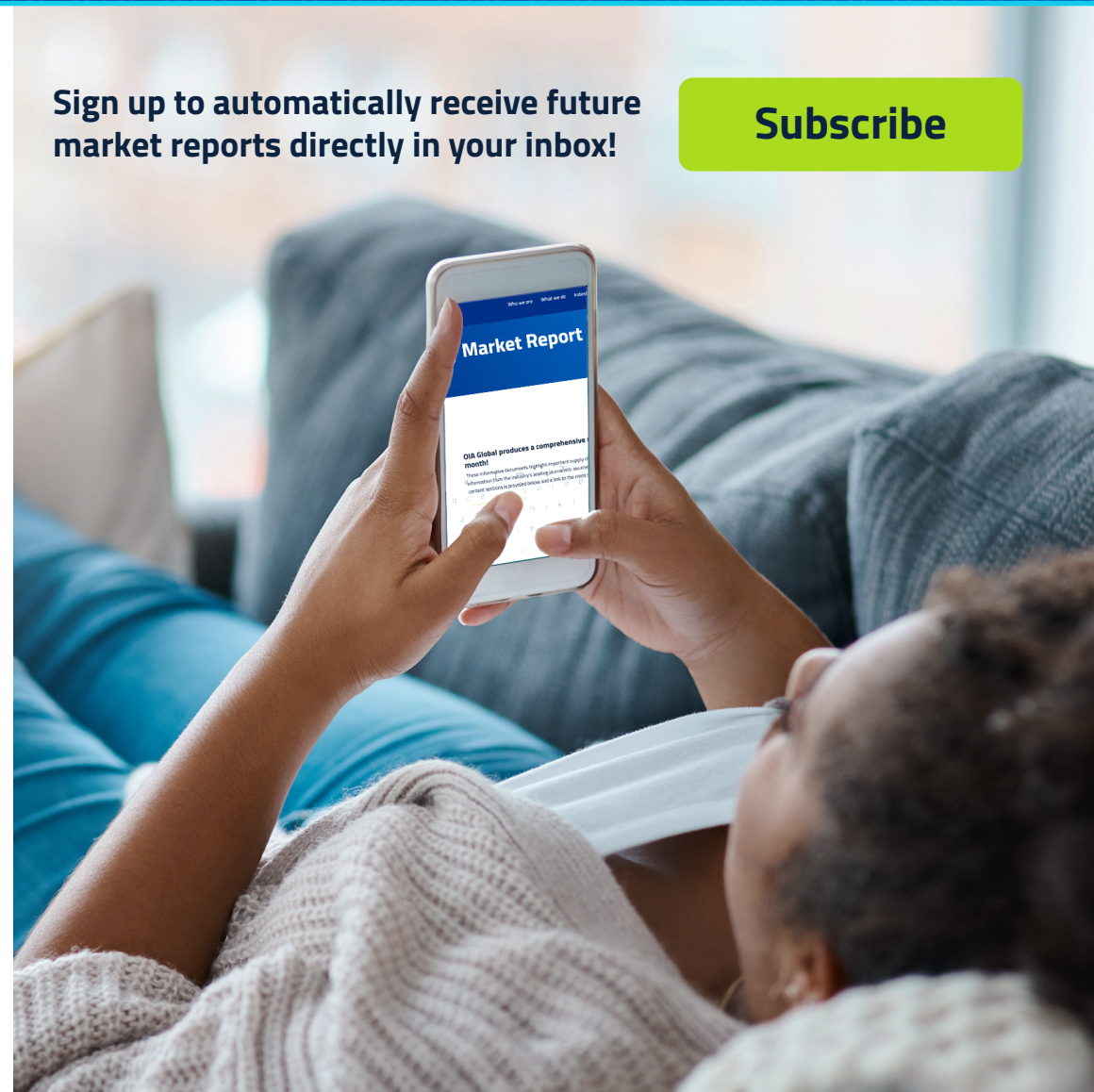
LAWS/LEGISLATION	7-8
▪ USTR & CBP prepare for target port fees against China.....	7
TARIFFS	8
▪ Foreign Trade Zones (FTZs) vs. Bonded Warehousing.....	8
▪ De Minimis elimination and nearshoring opportunities.....	8

Technology

INFRASTRUCTURE	5-6
▪ Mexico's new Interoceanic Corridor.....	5
▪ Kazakhstan projects major rail growth via Chinese investment.....	6
SUSTAINABILITY	9
▪ U.S. rejects IMO's Net Zero Framework.....	6
▪ European Commission's ReFuelEU Aviation initiative.....	6
TRANSPORT TECHNOLOGY	11
▪ New service offering: ShipNow by OIA Global.....	11

Sign up to automatically receive future market reports directly in your inbox!

[Subscribe](#)





Houthi-supported rebels in Yemen are **widening** their scope of attack, calling it a "fourth phase" in their blockade of Red Sea shipping: *"This phase includes targeting all ships belonging to any company that deals with the ports of the Israeli enemy, regardless of the nationality of that company, and in any location within the reach of our armed forces."*



Effective immediately, vessels that are either owned, managed or operated by an entity related to Israel will not be permitted **to berth** in Turkey. The regulation **applies** across all Turkish ports and bars Turkish-flagged vessels from **calling** at Israeli ports.

- The restrictions build on a trade ban first announced in May '24, when Turkey suspended >\$7b in bilateral commerce with Israel.

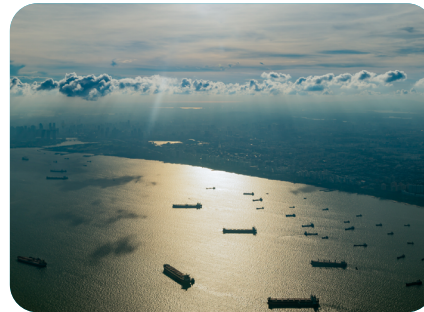


Complex networks of brokers and shipowners are becoming increasingly skilled at **circumventing** international sanctions, with oil shipments out of Iran toward China often involving opaque ownership and ship-to-ship transfers.



South Korea will **begin** pilot operations on Arctic shipping routes in 2026, **creating** a special government task force to **develop** its strategies. China is actively **expanding** its shipping influence throughout the Northern Sea Route (NSR) as well.

Mid-size and feeder vessels are dominating newbuild orders as the containership orderbook is now >10.4m TEUs, the highest levels since 2010. The orderbook ratio has also risen to 31.7% of the total fleet.



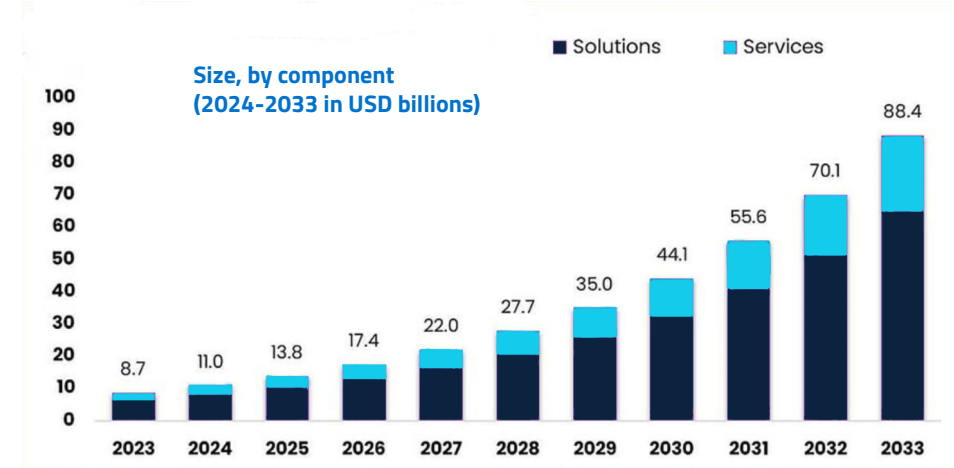
"Container ship demolition has all but collapsed in 2025. The sale of a vessel for recycling has become such a rarity that each transaction is now an event in itself"
- Jonathan Roach, Braemar Researcher



Inland hubs in Asia Pacific like Delhi, Pune, Ho Chi Minh City, and Chongqing are experiencing increased demand, with cross-border access and multimodal integration shaping the region's network development. Simultaneously, urban congestion, infrastructure inconsistencies, seasonal weather, and regulatory complexity continue to impact last-mile reliability.

Global AI in Warehousing Market Valuation

The global market for warehousing artificial intelligence (AI) is **expected** to jump from \$8.7b in 2023 to \$88.4b by 2033, **growing** 26.1% year-over-year (YoY) during the next decade.





South Africa's Recovery Plan Takes Shape

Beset by corruption, theft and dilapidated infrastructure, South Africa's Transnet is seeking to boost private participation in its ports and railways.



South Africa's government **shortlisted 11 private companies to operate on the nation's freight-rail network and help improve logistics bottlenecks that have dragged down economic growth.** The companies will negotiate with Transnet SOC Ltd. to secure access to routes and corridors, and licenses of up to 10 years will be allocated to firms that make the final cut.

Transport Minister Barbara Creecy said the selected private operators will carry an additional 20m tons of freight annually from the 2026-27 financial year onward, which could unlock as much as rand \$100b in new investments.



According to the latest [U.S. Bank Freight Payment Index](#), the U.S. road freight market **showed signs of recovery in Q2 '25, with national shipment volumes +2.4% and spending +1.2% from Q1 '25, the first quarter-to-quarter gain in both metrics in three years.**



The Panama Ship Registry is the first naval registry globally to **implement mandatory traceability for ship-to-ship (STS) operations.** Under the new requirements, any Panamanian-flagged oil vessel with gross tonnage of 150+ tons must **notify** the Panama Maritime Authority at least 48 hours before conducting STS maneuvers, providing comprehensive technical and logistical details.

- The Panama Ship Registry **no longer accepts** oil tankers or bulk carriers that are 15 years or older in an effort **to limit** the use of 'shadow fleet' vessels that intentionally circumvent sanctions.



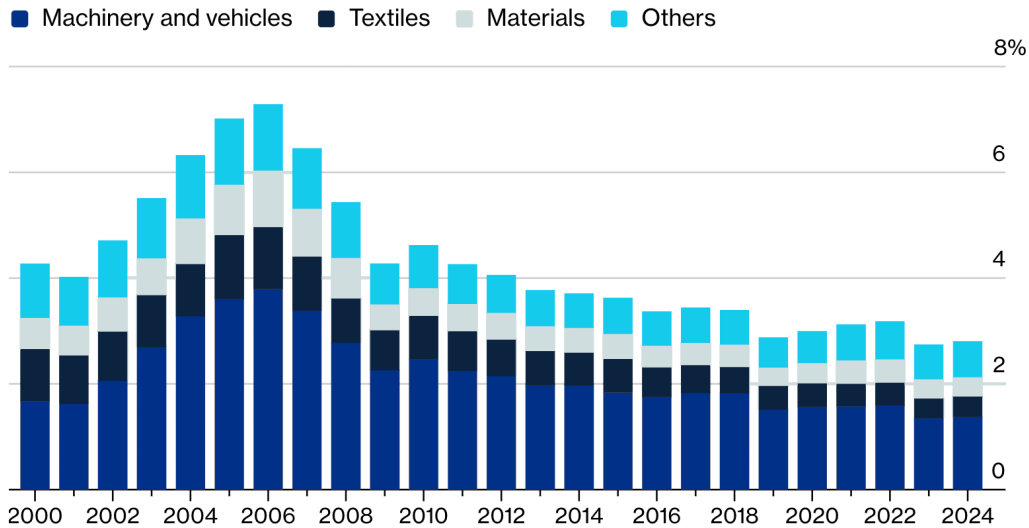
Argentina is upgrading the General Urquiza rail freight corridor from Buenos Aires northward, with the infrastructure program aiming to double the corridor's capacity and strengthen Argentina's cross-border rail connections with Uruguay and Paraguay.

- Separately, Argentina's government wants to **privatize** state-owned rail freight company Belgrano Freight & Logistics as it restructures the country's rail freight sector, transitioning towards an open-access model.



Shrinking Share

Chinese exports of goods to the U.S., as a share of China's gross domestic product (GDP).



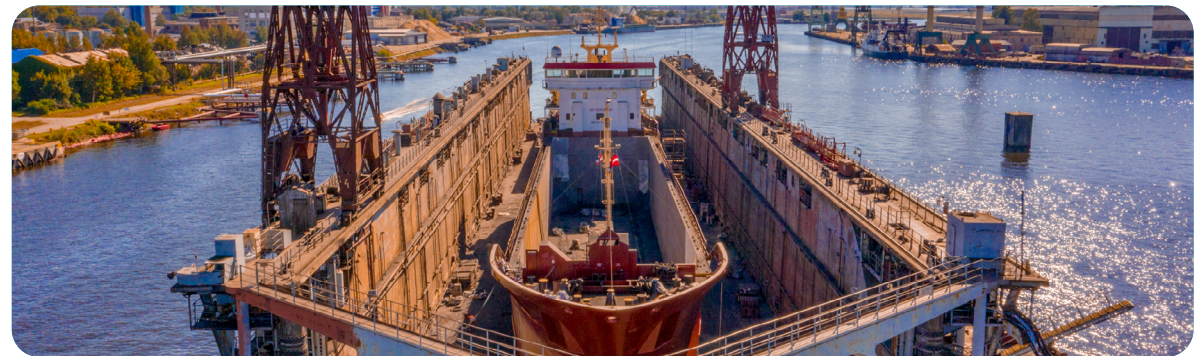
Sources: United Nations Comtrade database, International Monetary Fund World Economic Outlook April 2025, via Bloomberg.

South Korea Invests in U.S. Shipbuilding

As part of its tariff negotiations with the Trump White House, South Korea committed \$350b for projects in the U.S., of which \$150b is to be allocated for shipyards. Full details of the \$150b fund, and the timeline over which it will be spent, still remain unclear.

U.S. Trade Representative Jamieson Greer recently met with the leaders of South Korea's two largest shipbuilding companies, who both expressed support for the United States' efforts to bolster its domestic shipbuilding capacity. Koreans also expect the money to be used for acquiring and expanding shipyards in America, where there will be exports of high-value equipment, worker training, and support for maintenance and repair operations.

Three of the country's top shipbuilders—HD Korea Shipbuilding & Offshore Engineering Co., (HD KSOE), Hanwha, and Samsung Heavy Industries Co.—have formed a task force to discuss how “to support the government and its plans.”



- One of the few remaining commercial shipyards in the U.S. was rebranded as Hanwha Philly Shipyard after the South Korean conglomerate's \$100m takeover of the facility in 2024.
- Hanwha Group announced a \$5b infrastructure program for the Hanwha Philly Shipyard to install additional docks and quays that will increase capacity.

New Delhi, New Possibilities

This new location will work collaboratively with OIA's preexisting operations in India and the Asia-Pacific region to deliver seamless, integrated supply chain solutions, supporting OIA's broader strategy of growing in high-potential markets positioned at the center of shifting global trade flows. The New Delhi office provides a full suite of logistics services, including **air freight**, **ocean freight**, **project logistics**, **domestic road transportation**, **customs brokerage**, and **warehousing**.

Address

VEGAS Mall (Commercial Building)
Unit No. 581, 5th Floor, Plot No 6, Sec. 14, Dwarka,
New Delhi 110078

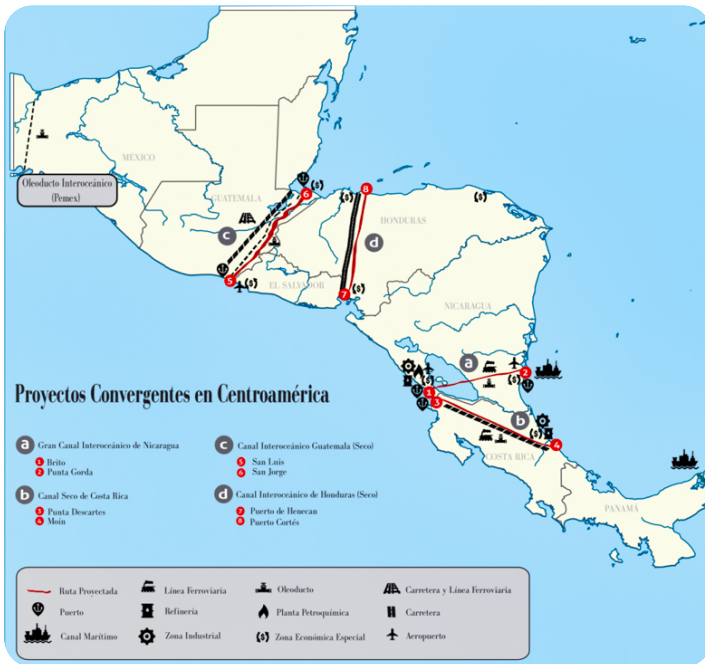
[More Information](#)

[Contact OIA](#)





Mexico's new InterOceanic Corridor, i.e. rail line, from Veracruz to Oaxaca **is now** officially open, **servicing** as an alternative Gulf-Pacific link other than the Panama Canal. Guatemala **intends** to build its own section of the InterOceanic Corridor as well.



South Carolina Ports (SC Ports) is progressing on two major infrastructure projects at the Port of Charleston:

- **Adding** a second ship berth to the Hugh K. Leatherman marine terminal to expand operations and boost rail capacity. SC Ports expects to complete the second berth by late 2026, bringing Leatherman's capacity to about 1.6m TEUs per year.
- **Deepening** the harbor to 52 feet, making it the deepest on the U.S. East Coast.

Once complete, the 1,600-foot wharf extension at Leatherman **will allow** for five additional ship-to-shore cranes, increasing overall capacity and allowing the terminal to handle ultra-large container vessels (ULCV) at all tides and two super-post-Panamax vessels at once.



Texas will **invest** >\$146b in transportation projects over the next 10 years, **focused** on congestion relief and improved safety, the largest plan of its kind in state history.



The first railway in Burundi **will link** with Tanzania's new standard-gauge network, forming part of the Central Corridor between India's key port of Dar es Salaam.

- India's rail freight network continues **to grow** at a rapid pace due to widespread infrastructure development and industry participation.



APM Terminals, Maersk's port operating entity, **signed** a memorandum of understanding with India's Andhra Pradesh Maritime Board to invest \$9,000 crore (USD \$1.1b) to develop three key ports in the state, **a major step towards making Andhra Pradesh the eastern gateway of India's logistics network.**

Major Ports Being Rebuilt in Syria

CMA CGM **committed** an additional €200m (USD \$232m) to **develop** Syria's war-damaged Latakia International Container Terminal (LICT), **accelerating** the second phase of its expansion project:

- Modernizing and digitizing port operations, including advanced cargo handling systems and integrated logistics platforms.
- Upgrading infrastructure to allow access to ships with a 16-meter draft.
- Connecting rail and road infrastructure to better support increased volumes with fluidity and efficiency.
- Expanding the container terminal to accommodate >1 million TEUs annually.



DP World will **invest** \$800m in Syria's Tartus port to **modernize** it and **make it** a strategic trade hub between Southern Europe, the Middle East, and North Africa. Tartus will **upgrade** its infrastructure and introduce advanced cargo-handling equipment and digital systems to improve operations across both container and general cargo terminals.

Kazakhstan Projects Rail Growth via Chinese Investments

The Middle Corridor, running via Kazakhstan, Azerbaijan, Armenia, Georgia and Turkey, is the shortest railway path between China and Europe, and has become increasingly attractive as shippers look to avoid Russia. **Traffic on the Kazakhstan Railways (KTZ) network has doubled over the past 10 years, with a total of 27.4m tons recorded in 2024. This trend is expected to reach 33m tons in 2025 and 67m tons by 2029.**

China Railway (CR) is developing the Middle Corridor with Kazakhstan Railways (KTZ) to improve infrastructure connectivity and implement upgraded rail lines, logistics facilities and intermodal terminals. Additionally, KTZ recently **signed** a loan from Abu Dhabi Commercial Bank and Deutsche Bank to borrow up to SFr \$480m (\$USD \$595.5m) for key infrastructure projects along the Trans-Kazakhstan corridor.



Five new rail lines are currently under construction in Kazakhstan:

- Dostyk–Moyinty (connecting China's border with central Kazakhstan)
- Almaty bypass line (Southern Kazakhstan)
- Darbaza-Maktaaral (Turkestan region)
- Moyinty-Kyzylzhar (Connects western/central Kazakhstan)
- Bakhta-Ayagoz (Eastern Kazakhstan; improves connections with China)



USTR & CBP Prepare for Targeted Fees Toward China

Established by the U.S. Trade Representative (USTR), the U.S. is preparing to **introduce** new port entry fees for Chinese-owned, operated, and built vessels starting on October 14th, 2025. The new rules targeting vessels with Chinese associations and are set to **impact** global shipping patterns significantly.

The charges start at \$50 per net ton and rise to \$140 by 2028. For vessels built in China but not controlled by Chinese interests, separate fees will also apply: the greater of \$18 per net ton or \$120 per container, reaching \$33 per ton or \$250 per container by 2028.



- U.S. Customs & Border Protection (CBP) is the designated collector of the new fees, and **confirmed** that a new Pay.gov payment portal is under development for such remittances.
- Non-payment may block cargo operations and port clearances via immediate operational bans.

Both Orient Overseas Container Line (OOCL) and parent COSCO are already launching new TransPacific services that avoid the U.S. and route via Mexico instead. OOCL **admits** the changes will have “a relatively large impact” on operations.



The U.S. Treasury Department’s Office of Foreign Asset Control (OFAC) **unveiled** fresh sanctions on 115 Iran-linked individuals, and their business interests. The charter terminations will effectively reduce Sealead’s fleet by one-third, removing 16/53 of the liner’s ships.



The Trump administration **halted** the issuance of worker visas for commercial truck drivers and **paused** the application process, specifically for trucks in the H-2B, E-2, and EB-3 visa classifications. The order does not impact B1/B2 visas, which most third-country-national drivers in Canada and Mexico use to enter the U.S.



The U.S. Department of Transportation (DOT) is **updating** its National Freight Strategic Plan (NFSP) for the first time since 2020 to help **improve** supply chain efficiency. The NFSP helps **guide** national policies and investments across the country’s supply chain ecosystem.



Five newly passed legislative acts—the Bills of Lading Act, Carriage of Goods by Sea Act, Merchant Shipping Act, Coastal Shipping Act, and Indian Ports Act—are part of India’s plan to **update** its maritime laws from the era of British governance.

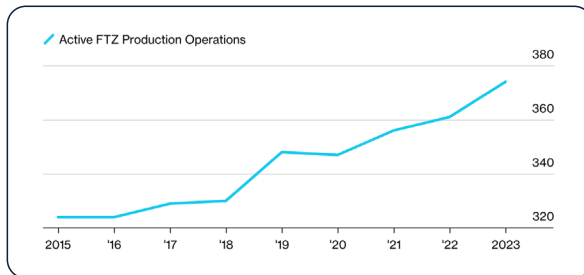
“These opportunities open up a \$1 trillion maritime investment roadmap, with strong potential for joint ventures in developing ports and cargo terminal operations, multi-modal terminals, maritime services, shipbuilding, ship recycling and ship repairs, green hydrogen hubs, and sustainable shipping solutions.”
- Sarbananda Sonowal, Union Minister for Shipping.

India’s maritime investment roadmap **targets** port and cargo terminal development, multimodal transport hubs, shipbuilding, ship recycling and repairs, alongside investments in green hydrogen, bunkering and sustainable shipping.

Laws / Legislation (Tariffs)

Foreign Trade Zones vs. Bonded Warehousing: What's Right for You?

Both offer tariff mitigation strategies for shippers importing goods into the U.S., but there are critical differences between the two. This [informative blog post](#) will help you understand which option is best for your unique business needs.



Data shows that Foreign Trade Zones (FTZs) have become increasingly critical among international trade, especially during heightened global trade tensions. FTZs have been a key enabler of U.S. exports as the number of active FTZ operations has climbed since the first USA/China trade conflict in 2018/2019.



[More Information](#)

[Contact OIA](#)

De Minimis Elimination & Nearshoring

International postal operators and shippers are [suspending](#) low-value parcel shipments to the U.S. while actively [searching](#) for new solutions to the United States' updated *de minimis* requirements, which [took effect](#) August 29th.

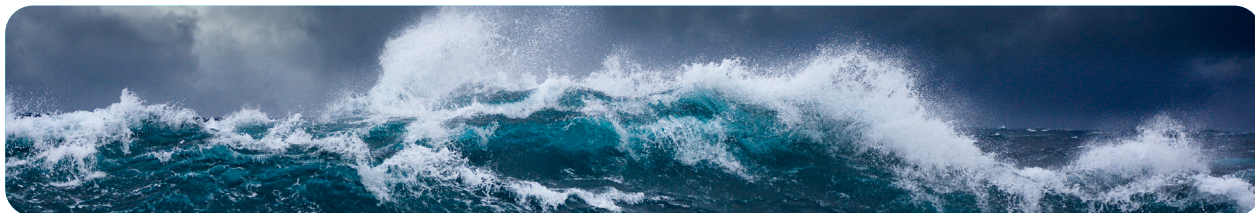
The *de minimis* rule allowed goods valued at \$800 or less to enter the U.S. duty-free and with minimal customs oversight. This major change has led to [increased](#) demand for foreign trade zones (FTZs) and innovative logistics solutions. [U.S.-based logistics providers like OIA are well-positioned to help international retailers nearshore their supply chain via integrated, omnichannel supply chain solutions.](#)



[Learn More](#)

U.S. Rejects IMO's Net Zero Framework

In a [joint statement](#), the Trump Administration strongly [rejected](#) the International Maritime Organization's (IMO) [Net-Zero Framework](#), which aims to [establish](#) mandatory marine fuel standards and GHG emissions pricing for the shipping sector.



"The Trump Administration unequivocally rejects this proposal before the IMO and will not tolerate any action that increases costs for our citizens, energy providers, shipping companies and their customers, or tourists. Our fellow IMO members should be on notice that we will look for their support against this action and not hesitate to retaliate or explore remedies for our citizens should this endeavor fail!" For context, the U.S. is one of 176 IMO member states.

ReFuelEU Aviation

Recently introduced by the European Commission, the ReFuelEU Aviation regulation [mandates](#) that fuel suppliers delivering to E.U. airports [blend](#) a minimum percentage of Sustainable Aviation Fuel (SAF) into their supply: 2% in 2025, growing incrementally to 70% in 2050.

- Airlines are passing the associated costs onto customers, which may affect pricing for shipments moving through the European Union and United Kingdom.
- Similar requirements have also been enacted or planned in British Columbia, Brazil, Indonesia and Singapore.
- **Globally, SAF as a percentage of all aviation fuel is expected to increase from 0.3% to 0.7% this year. Although carriers are using more SAF than ever before, these climate benefits are being outweighed by increases in air travel.**

The U.S. Environmental Protection Agency (EPA) wants to [rescind](#) the 2009 endangerment finding, which [allowed](#) the EPA to address climate change under the Clean Air Act. **This would [eliminate](#) the EPA's authority to [regulate](#) greenhouse gas (GHG) standards for vehicles, including heavy-duty trucks, completely [altering](#) the market for fleet vehicles and components.**



The Global Maritime Forum's Getting to Zero Coalition recently published a key report, "[From Pilots to Practice: Methanol & Ammonia as Shipping Fuels](#)," drawing on interviews with 40+ industry organizations and concluding that both methanol and ammonia have [transitioned](#) from theoretical solutions to practical reality as zero-emission shipping fuels.

- There are >60 methanol-capable vessels already in operation, 300 more on order, and bunkering available at approximately 20 ports.
- Ammonia is approaching proof of concept as a marine fuel, with engine tests suggesting it can reduce tank-to-wake emissions by up to 95%. The first ammonia-powered vessels have been successfully piloted, engine testing is nearing completion, and bunkering trials are underway.

Mergers & Acquisitions



South Korean shipbuilding companies HD Hyundai Heavy Industries (HHI) and HD Hyundai Mipo (HMD) revealed plans to **merge** into a single entity. The two companies are affiliates of HD Korea Shipbuilding & Offshore Engineering (HD KSOE).



Turkish Airlines is **acquiring** a minority stake in Spanish operator Air Europa via a €300m (USD \$349m) investment.



CK Hutchison's sale of its 40+ global port facilities to U.S.-based investor BlackRock and Mediterranean Shipping Company (MSC) could be blocked by China, unless Chinese shipping company COSCO is included in the deal.

- Cosco is **seeking** at least a 20–30% stake in a \$23b ports deal that involves key assets in the Panama Canal. Cosco was the only Chinese company **allowed** in the discussions, giving it immense negotiating power as the other entities would need a Chinese partner to get approval from China's State Administration for Market Regulation.
- Chinese authorities say they will continually **monitor** the negotiations and progress of the sale.

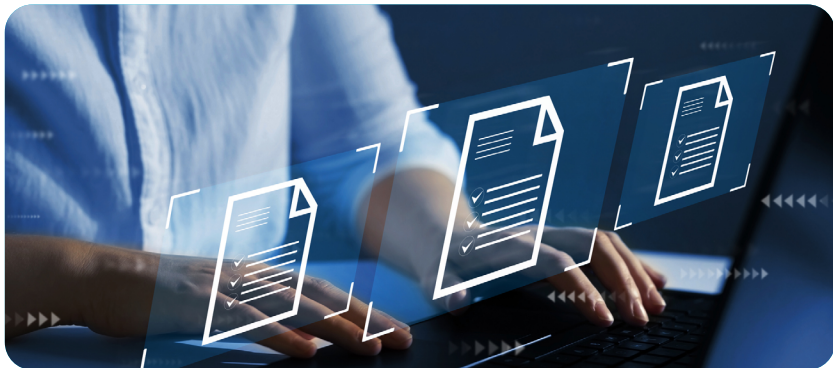


Union Pacific Corp. announced a bid to purchase Norfolk Southern Corp. for \$85b in stock and cash, according to a joint statement from both companies. If 2/6 of the United States' largest railways combine, it would create the largest railroad in North America and a truly transcontinental railroad that connects more than 50,000 route miles across 43 states, linking approximately 100 ports.

- Any combination between the two freight railway operators **will face** intense regulatory scrutiny from the U.S. Surface Transportation Board (STB), the federal freight railroad regulator. The merger is also **seeing** growing opposition from labor unions, other Class 1 rail operators, and key shipping groups.
- **The U.S. rail industry has already undergone significant consolidation in recent decades, shrinking from dozens of carriers to six major Class I railroads.**
- The U.S. rail freight industry is **dominated** by four top carriers: two in the west and two in the east, meaning shippers would only have two carrier options when selecting a point of origin.

Transport Technology

The Trump administration **proposed an overhaul to how the government approves and regulates long-distance drone operations**. Currently, the Federal Aviation Administration (FAA) grants waivers or exemptions on a case-by-case basis for operators to use drones beyond the visual line of sight, but the proposal aims to eliminate that process, instead offering a more straightforward pathway for operators to secure regulatory approval.



The U.S. National Motor Freight Traffic Association's (NMFTA) new API standards aim to **reduce freight billing disputes for trucking professionals by notifying stakeholders of potential discrepancies before invoicing**.

A significant step in **digitizing** the less-than-truckload (LTL) shipment lifecycle, the NMFTA's Digital LTL Council's Preliminary Freight Charges (PFC) API Standard will give carriers, shippers, and 3PLs enhanced visibility and communication for freight bill charges before invoices are issued.



ShipNow by OIA Global

New digital platform gives customers all quoting and booked freight activity, on demand!

ShipNow by OIA Global gives customers access to less-than-truckload (LTL) shipping rates from OIA's comprehensive transportation network in as little as 30 seconds. This easy-to-use web tool gives customers the freedom to quote costs when you need them; whether its to quote their own customer, confirm costs before approval to ship, or view carrier options and book ready-to-ship freight. **ShipNow gives customers the tools they need to get the right rate and carrier, when they need it.**

[More Information](#)[Contact OIA](#)



Since 1988, OIA Global has grown to become a world leader in supply chain management by delivering creative end-to-end logistics solutions with an industry-leading customer experience. Unlike many other companies, OIA goes beyond transportation management to offer customized contract logistics services, such as warehousing distribution and inventory management, as well as 4PL supply chain orchestration, innovative packaging design, raw materials management, and several advanced technology solutions.



oiaglobal.com