



Market Report 1/2026



# Company Capabilities

OIA Global is a leading provider of end-to-end **supply chain solutions**, delivering resilient **logistics services** that adapt to a dynamic world. OIA's capabilities include road, ocean, air freight, **contract logistics**, **project logistics**, **customs brokerage**, **packaging**, **raw materials management**, and **4PL** orchestration. By integrating automation and innovation, OIA transforms data into actionable intelligence, enabling smarter decisions and greater agility for customers across these **key industries**: automotive and mobility, electronics, energy, healthcare, industrial, and retail and lifestyle.



**1,200+**

Employees

**60+**

Offices

**30+**

Countries



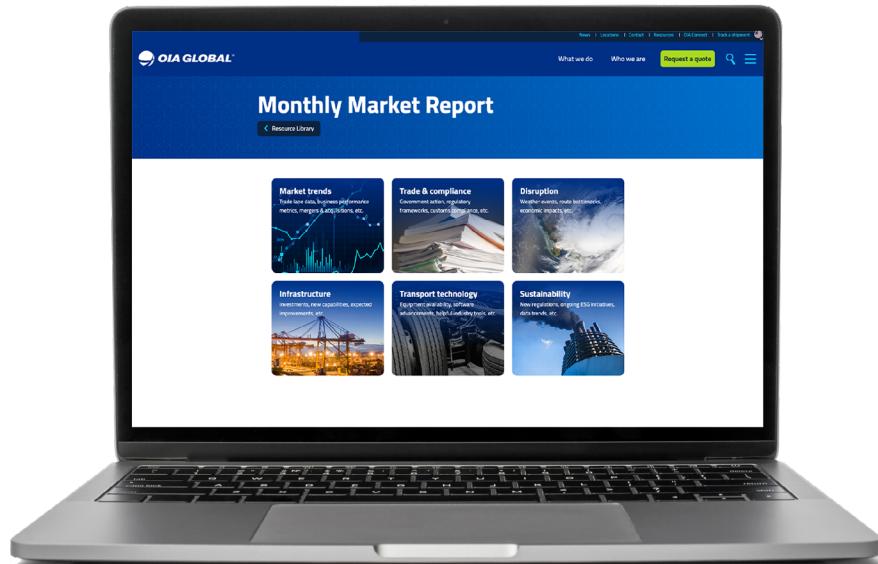
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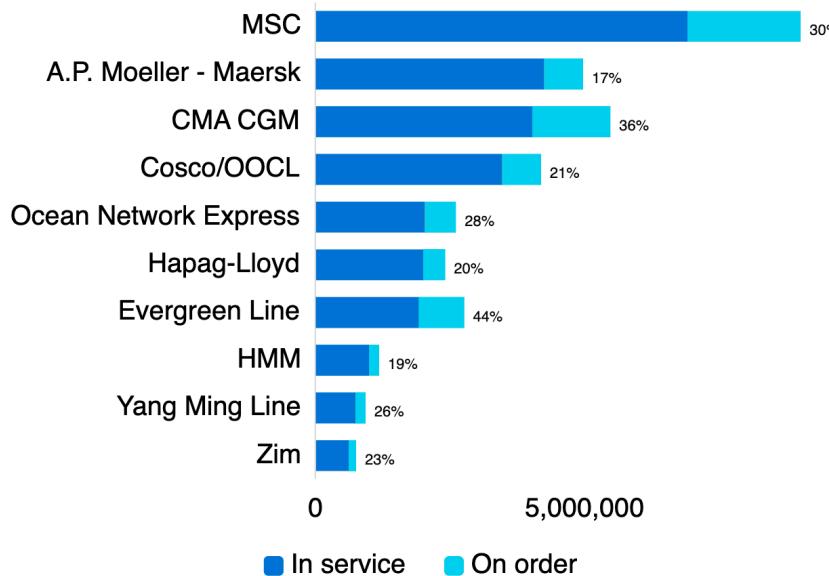
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# Market Trends

## Container Ship Capacity by Carrier

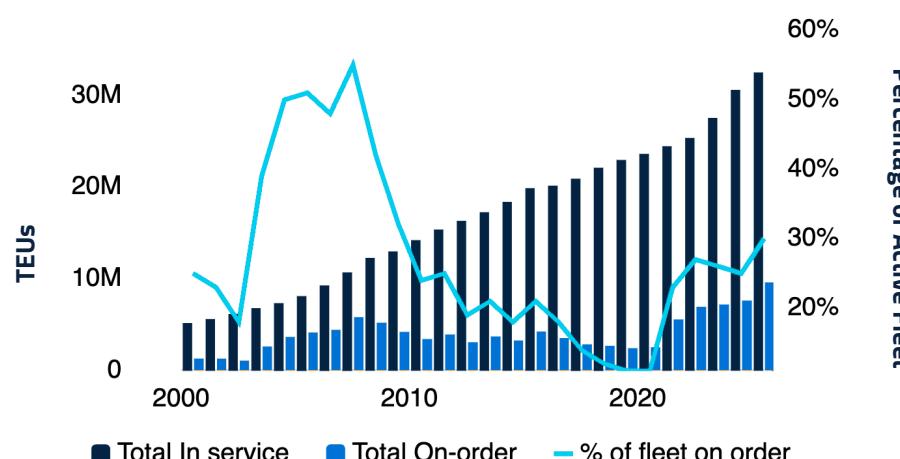
(In service and on order)



Data Source: Sea-Web, S&P Global.

## Container Ship Orderbook Hits >30% of Total In-Service Fleet

- Global container ship capacity in service measured in TEUs and on order as a percentage of the total in-service fleet.
- China's shipyards have accounted for 72% of total orders year to date (YTD).

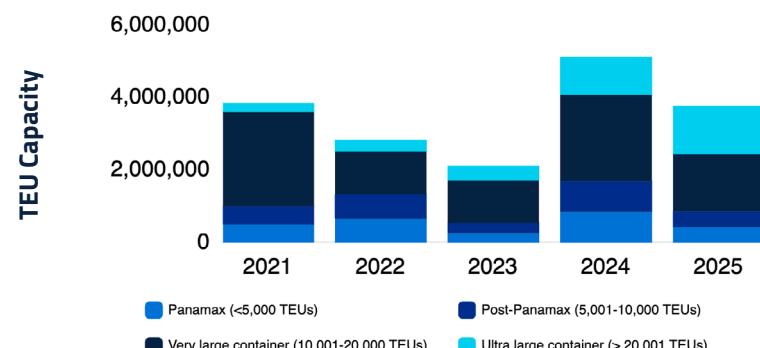


Global container ship fleet order book development (By ship sizes each year)

## Majority of Ordered Vessels are 10,000+ TEUs

Some 1.48M TEUs of tonnage will be delivered to shipowners in 2026, a 17.7% decrease from what was received in 2025.

New vessel orders in the dry bulk shipping sector have diminished significantly, with bulker newbuilding contracting capacity falling 54% year-over-year (YoY) to 25M deadweight tons between January and November 2025.



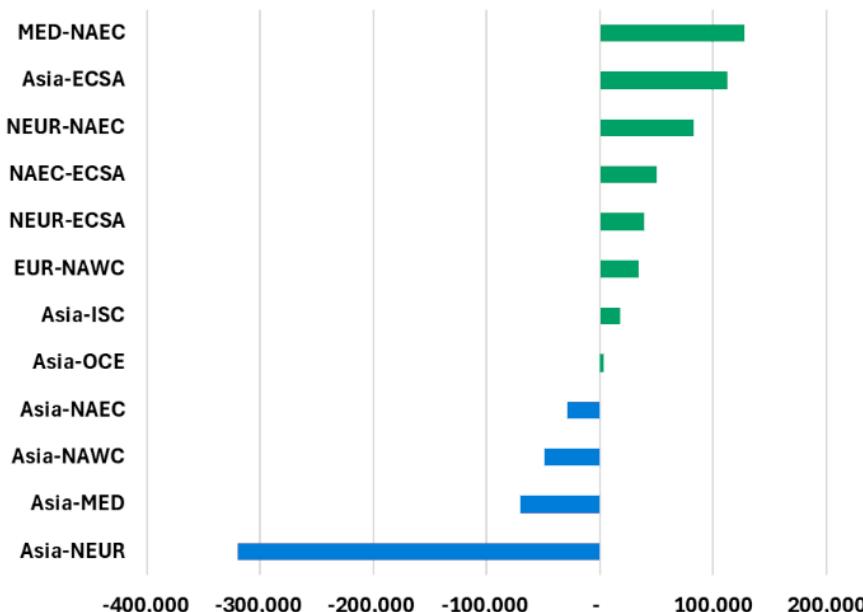
# Market Trends



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## Net Tonnage Displacement During H2 '25

TEU inflow minus total TEU outflow



Source: Sea-Intelligence, Port Technology

A cascading effect **occurred** during the second half of 2025 as vessel capacity once absorbed by primary trade lanes, particularly major Asia–Europe routes, spilled into secondary trade lanes.



U.S. Customs & Border Protection (CBP) has **collected** >\$1B in duty revenue from over 246M low-cost shipments since **phasing out** the *de minimis* exemption.



Increased tariff revenues imposed by the Trump Administration have not offset the gap between what the U.S. imports and what it sells overseas. The U.S. trade deficit has **fallen** significantly, and higher tariffs are certainly raising money, but they still account for just a fraction of the federal government's total revenue.



The Premier Alliance—ONE, Yang Ming, and HMM—is trying to improve poor schedule reliability by **shifting to a concentration of port calls at key hubs**.

*"New service updates will see the alliance call at more ports directly, so it looks more like a hub and spoke network without actually being it. They are looking to bridge the gap to service level improvements because schedule reliability can't get any worse than now."*

– Peter Sand, Chief Analyst at Xeneta

# Market Trends

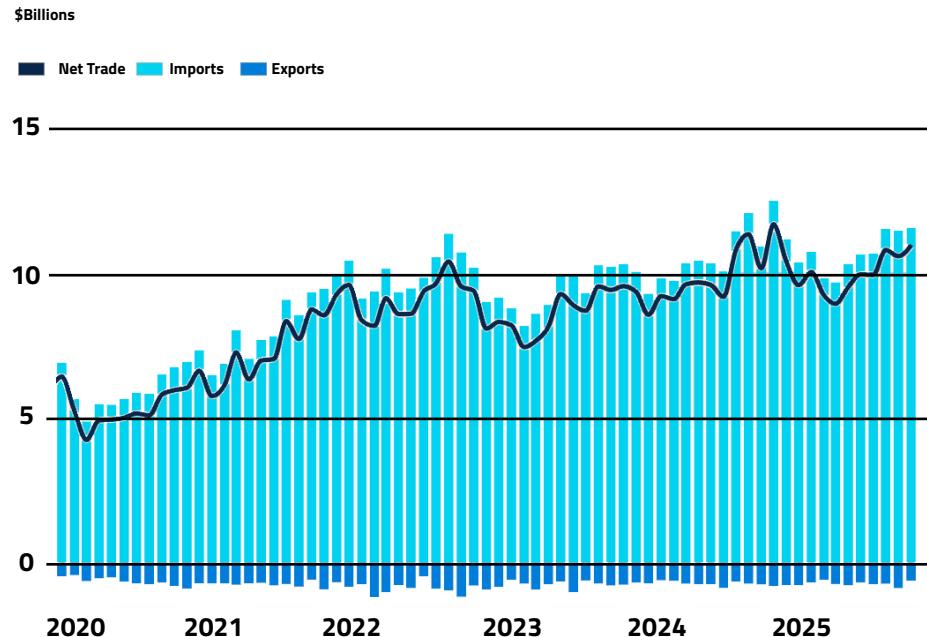


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## China Is Now Mexico's Second-Biggest Supplier

Mexico's imports from China have grown >75% since 2020.



Source: BCMM, Data Mexico, Financial Times.



## Mexico's share of imports in 2024 (By origin)

US (dark blue), China (medium blue), EU (cyan), Germany (green), Japan (yellow), Others (light grey)



Source: Bank of Mexico, Bloomberg



Mexico's government [approved](#) new tariffs on a range of key Asian countries, including China, India, South Korea, Thailand, and Indonesia, with the changes [effective](#) as of January 1<sup>st</sup>, 2026.

# Market Trends



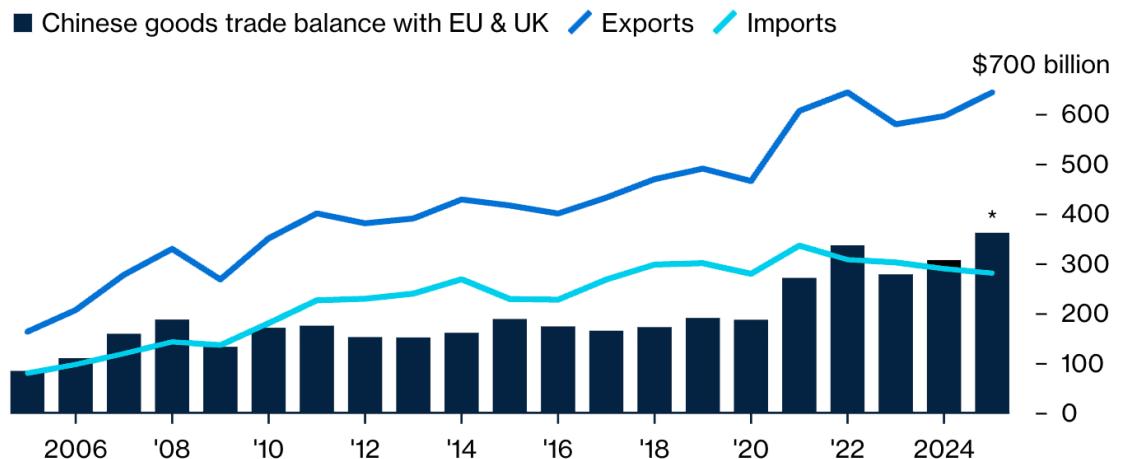
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## \$1 Trillion

**China's trade surplus exceeded \$1T for the first time.** Exports rose 5.9% year-over-year (YoY) despite a plunge in Transpacific shipments to the U.S. The huge surplus underscores China's struggle to rebalance its economy away from dependence on foreign demand, with net exports accounting for almost a third of economic growth this year.

**Two simultaneous trends are reshaping the global shipping landscape:**

- Surging Chinese exports to emerging markets and non-traditional trade partners
- Collapsing Transpacific volumes to the U.S.



Source: China's General Administration of Customs, Bloomberg  
Note: 2025 data is a projection based on growth rate through November.



# Market Trends

## Mergers & Acquisitions

**DP World is consolidating its Marine Services brands into a single entity.** The three businesses will now operate as Shipping Solutions (formerly Unifeeder), Multimodal Solutions (formerly P&O Ferrymasters) and Maritime Solutions (formerly P&O Maritime Logistics).



**Both large and small shippers can bid for direct access the U.S Postal Service (USPS) agency's last-mile delivery infrastructure starting in early 2026.** Winners will gain access to the agency's delivery destination units (DDUs), which are the last stop in its network before packages reach their final address. There are >18,000 DDUs nationwide.



Currently, shipments moving across the country must be handed off between different railroad companies, creating delays and inefficiencies.

**A combined system would create 10,000+ new single-line service lanes, eliminating an estimated 2,400 rail car and container handlings and 60,000 car-miles each day, which could dramatically improve the speed and reliability of transcontinental freight movements.**

## Union Pacific, Norfolk Southern Merger Progresses

Both companies recently filed a 7,000-page application with the U.S. federal government's key regulatory agency, the Surface Transportation Board (STB).

- The combined entity would create a network with 53,000+ miles of track across 43 states, connecting >100 ports.
- Roughly 75% of the projected traffic growth will come from converting truckload business to rail, with the balance diverted from competing railroads.

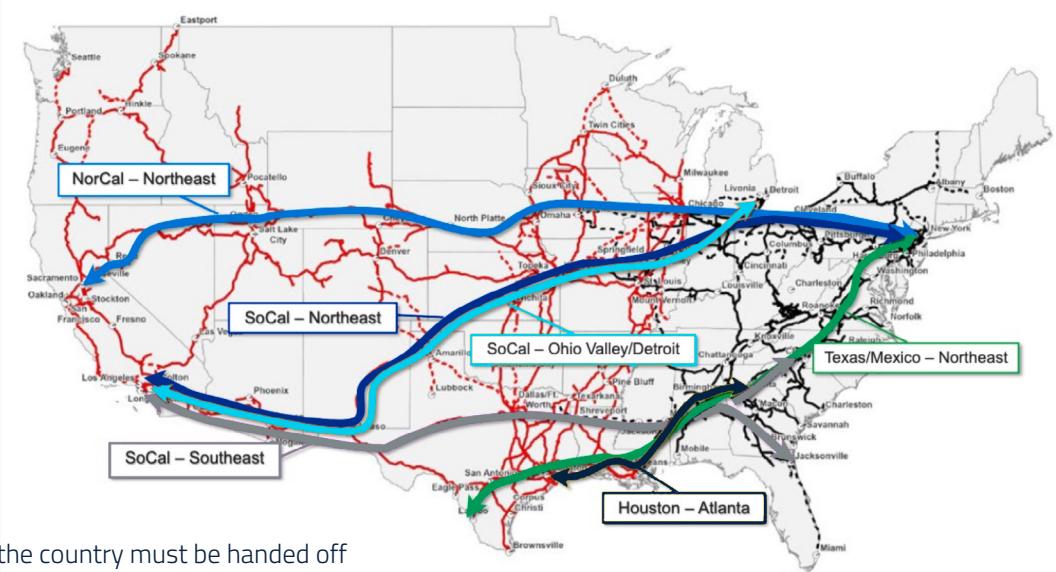


Image source: UP, FreightWaves.

# Infrastructure



**China, Kyrgyzstan, and Uzbekistan signed a \$4.7B joint venture to build 486km of railway connecting the three countries.**

- The new rail lines will create freight transit routes between China and Europe with a capacity of up to 12M tons per year.
- Seven new China/Europe routes were recently [added](#), bringing total train movements to >1000 per year.



Colombia's National Infrastructure Agency is [prioritizing](#) several key corridors as part of the country's rail revival program:

- Caribbean – Pacific Interoceanic Line
- La Caro – Central Corridor
- Buenaventura – Palmira
- Yumbo – Caimalito
- Villavicencio – Puerto Gaitán

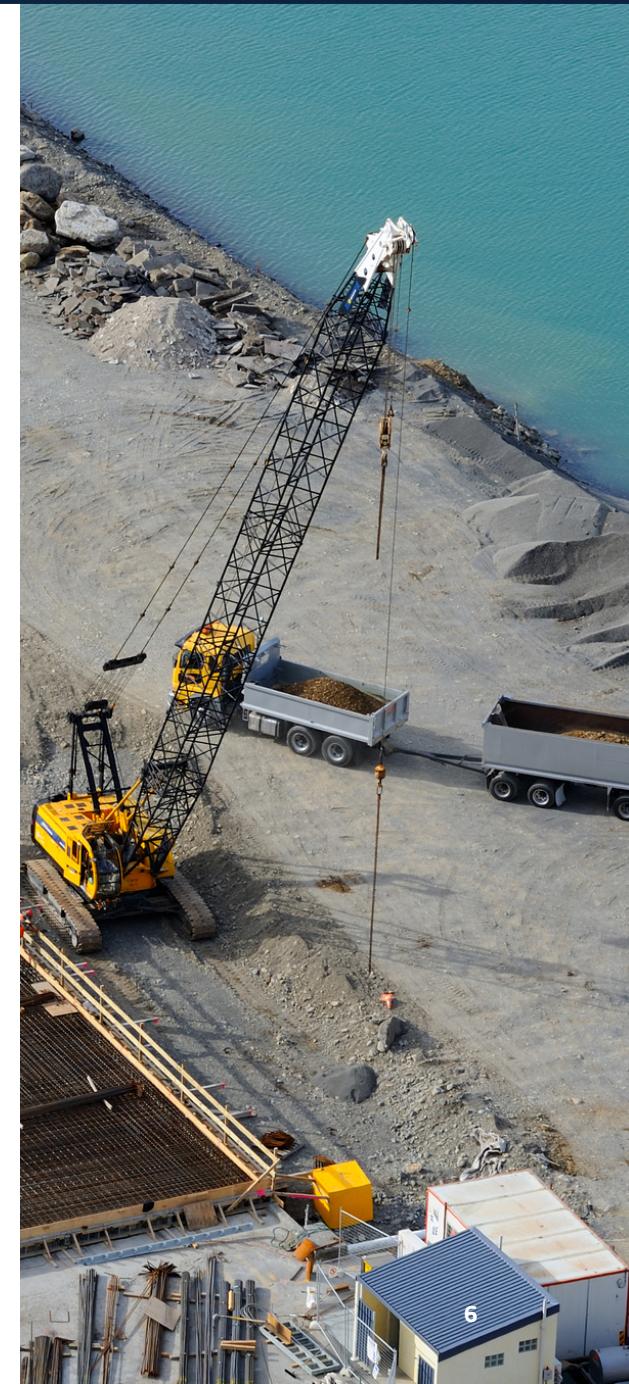


Transnet SOC Ltd. [will expand](#) its main terminal at South Africa's top container hub in Durban.

- Pier 2 handles +/- 70% of Durban port's total throughput and >40% of South Africa's container volumes.
- New technology is expected to increase Pier 2's capacity by 40%, reaching 2.8M twenty-foot equivalent units.
- New equipment will improve gross crane moves per hour from 18 to 28.



The International Container Terminal Services, Inc. (ICTSI) Rio Brazil Terminal at the Port of Rio de Janeiro, will [receive](#) a R\$948m (USD \$174.5m) private investment to expand and modernize, [increasing](#) annual capacity from 440,000 to 750,000 TEUs.



# Sustainability/ESG

## ZEMBA's Second Tender

Hapag-Lloyd and North Sea Container Lines (NCL) were awarded the second tender for low-emissions container shipping from the Zero Emission Maritime Buyers Alliance (ZEMBA), a group that includes major brands like Amazon, Patagonia, Nike, and others. The award will be split between two new in-development fuel types, e-methanol and e-ammonia:

- Hapag-Lloyd will deploy e-methanol on its large containerships for the trans-oceanic lane, while regional feeder company
- North Sea Container Line will use its new vessel *Yara Eyde*, the world's first ammonia-powered containership, to fulfill the northern European trade lane.



The European Commission plans to **force electrification** of the rental and company car markets by 2030, installing a quota on large businesses to buy mostly electric vehicles (EVs).

- Some have criticized this move as "a backdoor ban" on petrol cars since 6/10 cars sold in Europe are to corporate fleets. For some carmakers, this segment accounts for as much as half of their annual sales.



Starting Jan. 1<sup>st</sup>, 2026, the EU's Emissions Trading System (ETS) requires shipping lines to account for 100% of carbon emissions, up from 70% in 2025, as part of its phased rollout. In response, carriers are implementing significant surcharges on trade lanes throughout the EU.



Mercedes-Benz, Volvo, and Kenworth all **expanded** their electric truck offerings to meet growing fleet demand for medium- and heavy-duty electric trucks.

- Kenworth launched its first conventional medium-duty battery-electric trucks—the T280E, T380E, and T480E—extending its zero-emission lineup for Class 6-8 applications.
- Mercedes-Benz Trucks has begun series production of the second-generation eActros 400 to compliment the eActros 600. The new models offer two battery packs, two cab options, and can be configured as tractor units or flatbed chassis to meet the needs of long-distance and distribution transport.
- Volvo Trucks is launching a new 15.4-short-ton version of its FL Electric medium-duty truck, designed specifically for agile inner-city transportation with its compact dimensions and zero tailpipe emissions.



## EU Changes Small Parcel Rules, Starting July 1<sup>st</sup>, 2026

The European Council will apply a fixed customs duty of €3 on small parcels valued at less than €150 entering the EU, starting July 1<sup>st</sup>, 2026.

- This encompasses about 93% of all e-commerce flows into the EU.
- The duty would apply per product type, based on six-digit tariff codes.

This means 10 pairs of socks of the same type would incur a 3-euro charge, but five pairs of socks made from wool and five from cotton would count as two item types and incur a 6-euro charge.



**The new Union Customs Code is significant, particularly for e-commerce operators:**

- Abolishes the 150-euro low-value consignment exemption
- Introduces simplified tariff treatment
- Extends marketplace liability with the “deemed” “importer” concept
- Introduces use of the IOSS to settle customs duties with the applicable import value-added tax.
- Introduces customs handling fees



## U.S. Customs Only Issuing Refunds Electronically

Starting Feb. 6, 2026, U.S. Customs and Border Protection (CBP) will issue all refunds electronically via Automated Clearing House (ACH), as announced in the Electronic Refunds Interim Final Rule published in the Federal Register.

- Refunds will only be issued electronically; checks will no longer be mailed, and importers without a proper ACH Refund Account will not be able to receive their refunds.
- The enhanced ACE portal enables secure electronic refunds, faster payments, fewer errors, and creates a simplified process for importers, brokers, and refund recipients.





**The United Nations (UN) General Assembly adopted a measure on negotiable cargo documents that will enable goods to be bought, sold, or used as collateral while still in transit.**

Negotiable cargo documents would serve as a title representing goods in transit across all modes of transport, which could enhance flexibility in trade, bridge the trade finance gap, and support increased digitization throughout global trade.

Unlike ocean bills of lading (BoL), transport documents issued by rail, road and air carriers—often known as consignment notes, air waybills, etc.—are not used as documents of title and cannot be transferred to another party during transport. In essence, this means cargo cannot be sold or transferred between parties while it is in transit.



**The Federal Maritime Commission (FMC) is considering formal countermeasures—cargo restrictions, per-voyage fines, etc.—against shipping entities linked to Spain.** This comes after a one-year investigation into Spain's refusal to dock U.S. vessels in 2024. The FMC is now soliciting public feedback on specific remedial actions.



**The Group of Seven (G7) countries and the European Union (EU) may replace the preexisting price cap on Russian oil exports with a full maritime services ban.**

- Spot-market Russian LNG will be banned from the EU once new regulations take effect in early 2026, while pipeline gas imports will be phased out by September 30<sup>th</sup>, 2027.



# Transport Technology



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**Chinese authorities are starting to penalize foreign vessels for operating SpaceX's Starlink satellites within its territorial waters.**

Many international ships have adopted Starlink due to its superior internet speeds as compared to traditional maritime satellite systems, using it for navigation support, crew welfare, and operational communications.

**Maritime operators now face a stark choice:** switch to approved alternatives, like China's Beidou navigation system, or local cellular networks when approaching Chinese waters, or risk substantial fines, equipment confiscation, potential vessel detention, and costly operational delays.



**The Federal Motor Carrier Safety Administration (FMCSA) announced a complete overhaul of the vetting process for Electronic Logging Devices (ELDs) that track truckers' hours of service.** The changes will help ensure non-compliant devices are blocked before they ever reach FMCSA's Registered ELD list.

- Some have been calling for the U.S. to adopt a system where approved third parties verify ELD compliance, like the Canadian system, but the FMCSA stopped short of this.



United Parcel Service Inc. (UPS) will invest \$120M in 400 robots used to unload trucks as part of a \$9B automation plan that aims to boost profits by decreasing labor costs.



## AI Systems Detect & Report Lost Containers

Following development and testing in simulation environments, Eyesea and EVI Safety Technologies are ready to test an artificial intelligence system for detecting and reporting lost containers aboard operational vessels.

- The system leverages computer vision and machine learning, using onboard deck and bridge cameras to automatically identify and count containers either falling from a ship or observed adrift.
- Once detected, incident data can be immediately transmitted to registered vessel owners, flag states, or coastal authorities.
- The Eyesea–EVI system aligns with the International Maritime Organization's (IMO) upcoming mandatory reporting requirements by producing precise, geo-tagged imagery and structured incident data.





OIA Global is a leading provider of end-to-end supply chain solutions, delivering resilient logistics services that adapt to a dynamic world. Our company's mission is to deliver peace of mind. Through proven solutions and exceptional service, OIA goes above and beyond to find the path to success for every customer.

OIA's capabilities extend beyond traditional transportation management to include comprehensive road, ocean, and air services, as well as contract logistics, project logistics, and customs brokerage. We also offer innovative packaging solutions, raw materials management, and 4PL supply chain orchestration.

By integrating automation, innovation, and AI into daily operations, OIA transforms data into actionable intelligence, enabling smarter decision-making and providing customers with better visibility and agility. OIA maintains expertise in several key industries: automotive and mobility, electronics, energy, healthcare, industrial, and retail and lifestyle, but also provides services in many others.

Founded and headquartered in Portland, Oregon, USA, the company now operates in 30+ countries with more than 1,200 employees across 60+ offices.



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