



Market Report 3/2026



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

[Case Studies](#)

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As volumes from China decline, Indonesia and Thailand have emerged as key alternative suppliers in Southeast Asia.

- In 2025, U.S. imports **increased** 30% from Thailand and 34% from Indonesia year-over-year (YoY)
- The U.S. and Indonesia have also been removing tariffs and **collaborating** more closely to establish favorable trade terms.
- Notably, these trade shifts have **occurred** while blank sailings were at a low.



India Bets on Air Cargo Growth

- India's government wants to move 10m tons of air cargo annually by 2030. The sector currently handles around 4m tons.
- The government is **opening** 50+ new airport facilities
- Air India has roughly 600 new aircraft on order
- Emirates SkyCargo is actively expanding its footprint in India



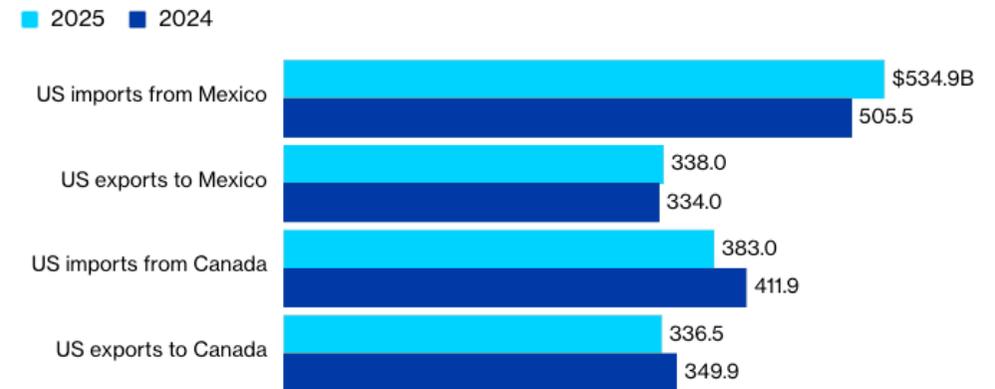
The Panamanian government formally **assumed** control of two key ports (Balboa and Cristobal) on the Panama Canal after the country's Supreme Court **annulled** a contract with CK Hutchison Holdings.

- Maersk and Mediterranean Shipping Company (MSC) **overtook** operations at the facilities on an interim basis.
- CK is working to **sell** its non-Chinese port business, which includes operations at these two ports.
- Blackrock, a major U.S. based financial institution, is still pushing to solidify a deal and acquire control of the port facilities.



Although the U.S. imposed a 10% global levy on foreign goods, it **kept** an exemption for many goods shipped under the US-Mexico-Canada Agreement, reiterating strong trade ties between the three neighbors.

- Trade between the U.S. and Mexico **increased** 3.9% year-over-year (YoY), rising from \$840b in 2024 to \$872.8b in 2025.
- Mexico **received** \$40.8b in Foreign Direct Investment (FDI) in 2025, a 10.8% YoY increase. This was Mexico's fifth consecutive year of FDI growth, and the highest figure ever recorded in a single year.

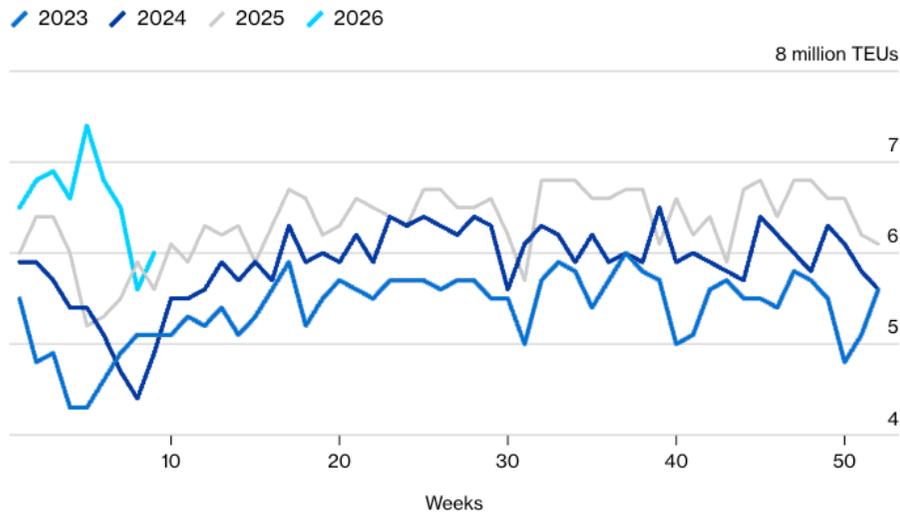


Source: U.S. Commerce Department, Bureau of Economic Analysis.



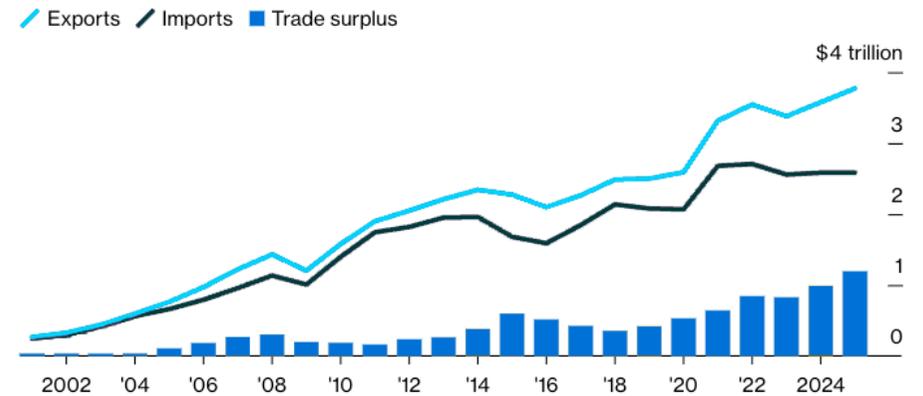
China Continues Strong Exports Amidst Geopolitical Uncertainty

>59m containers moved through Chinese ports during the first nine weeks of 2026, a +12% increase year-over-year (YoY). These volumes plummeted following the military interventions against Iran.



Source: China's Ministry of Transport, [Bloomberg](#).

Despite U.S. tariffs, China's trade surplus reached record levels in 2025, surpassing \$1.2T overall. Net exports accounted for roughly a third of China's GDP growth, the highest proportion since 1997.



Source: China's General Administration of Customs, [Bloomberg](#).

Pathways is OIA Global's focused approach to strengthening key trade corridors and delivering smarter, more reliable solutions where our customers need them most. Each Pathway highlights a strategic route supported by data, expertise, and the ability to create meaningful impact on speed, visibility, and supply chain performance.



Atlantic

Connecting the **Americas and Europe** through high-value lanes designed for reliability, consistency, and competitive advantage.



Pacific

Strengthening the most competitive **U.S.–Asia** corridors by applying pricing intelligence, carrier performance insights, and a responsive market approach.



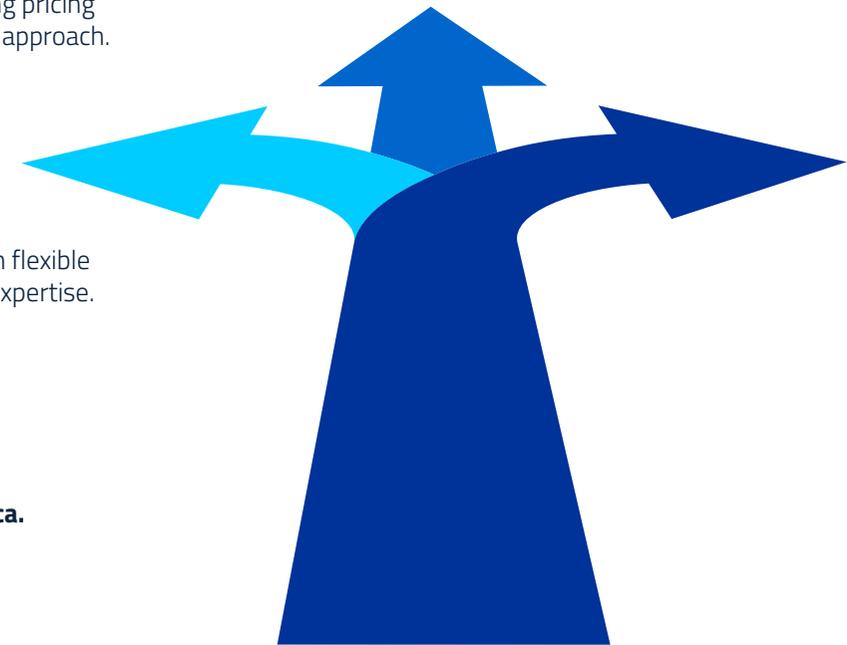
Eurasia

Enabling faster, smarter movement between **Asia and Europe** with flexible multimodal options, capacity management, and deep compliance expertise.



Southern

Unlocking emerging opportunities between **Asia and South America**.



 Peru will **construct** a new 120km freight line to connect the Pacific Port of Chancay with the country's central region. Project completion and entry into service are both scheduled for 2028.

 India's 307km rail expansion projects **will add** 52m tons of additional freight traffic per year:

- Doubling the Gondia (Maharashtra) - Jabalpur (Madhya Pradesh) line
- Quadrupling the Punarakh-Kiul line (Bihar)
- Quadrupling the Ganharia-Chandil line (Jharkhand)

 The Texas Transportation Commission **awarded** \$58.51m to Canadian Pacific Kansas City's (CPKC) rail grade separation and safety enhancement project at Santa Maria Boulevard in Laredo.

- Much of the commerce between the U.S. and Mexico moves through Port Laredo, Texas, the largest inland port in the U.S. and the top gateway for trade between the two countries.
- Two-way trade at Port Laredo totaled \$354b in 2025

 The Jacksonville Port Authority (JAXPORT) is **investing** \$250m to modernize its container terminals and raise the air draft to 205', which will allow larger vessels to access Jacksonville's deepwater harbor.

- Two new 50-gauge ship-to-shore (STS) container cranes have **entered** service at JAXPORT's Blount Island Marine Terminal.





IEEPA Tariff Refunds Still Uncertain

Following the Supreme Court's decision against Donald Trump's tariffs under the International Emergency Economic Powers Act (IEEPA), **the U.S. trade community faces a long and uncertain path to obtain refunds**. Roughly \$175b in tariffs were **collected** under Trump's emergency authority, which is now in legal limbo.

Trump's Justice Department **filed** a court appeal to try to slow the process down for another 90 days, but the judges **refused** and sent it to the next phase in the process.



Support Available for ACH Refund Setup

Because the refund process is still uncertain, importers should ensure their ACH refund accounts are properly configured with U.S. Customs & Border Protection (CBP) to help prevent delays if/when refunds are authorized. **Filing a protest** with U.S. CBP is the best way to preserve your right to a refund. If you have not yet established or confirmed your **ACH refund setup**, we strongly recommend doing so as a proactive measure:

- Preserves your refund rights
- Protects you if CBP requires protests as part of the refund process
- Ensures your claim remains active while litigation continues
- Failing to file a protest within 180 days of the liquidation date could jeopardize your ability to recover any paid duties. Learn more about the liquidation process [here](#).



OIA Global can help in several key ways:

- Review your entry data to identify eligible IEEPA-affected shipments
- Track liquidation dates to ensure deadlines are met
- Prepare and file protests on your behalf
- Submit protests in batches to improve efficiency
- Coordinate with your legal counsel (if applicable)



The European Parliament **paused ratification** of the European Union's (EU) trade deal with the U.S., following a court ruling that invalidated President Trump's IEEPA tariffs. **The parliament's trade committee wants more information from the U.S. about how it will preserve a 15% ceiling on most EU products—a level both sides agreed to in a 2025 trade pact.**



The U.S. and Bangladesh strengthened trade ties, **agreeing** to more favorable trade terms:

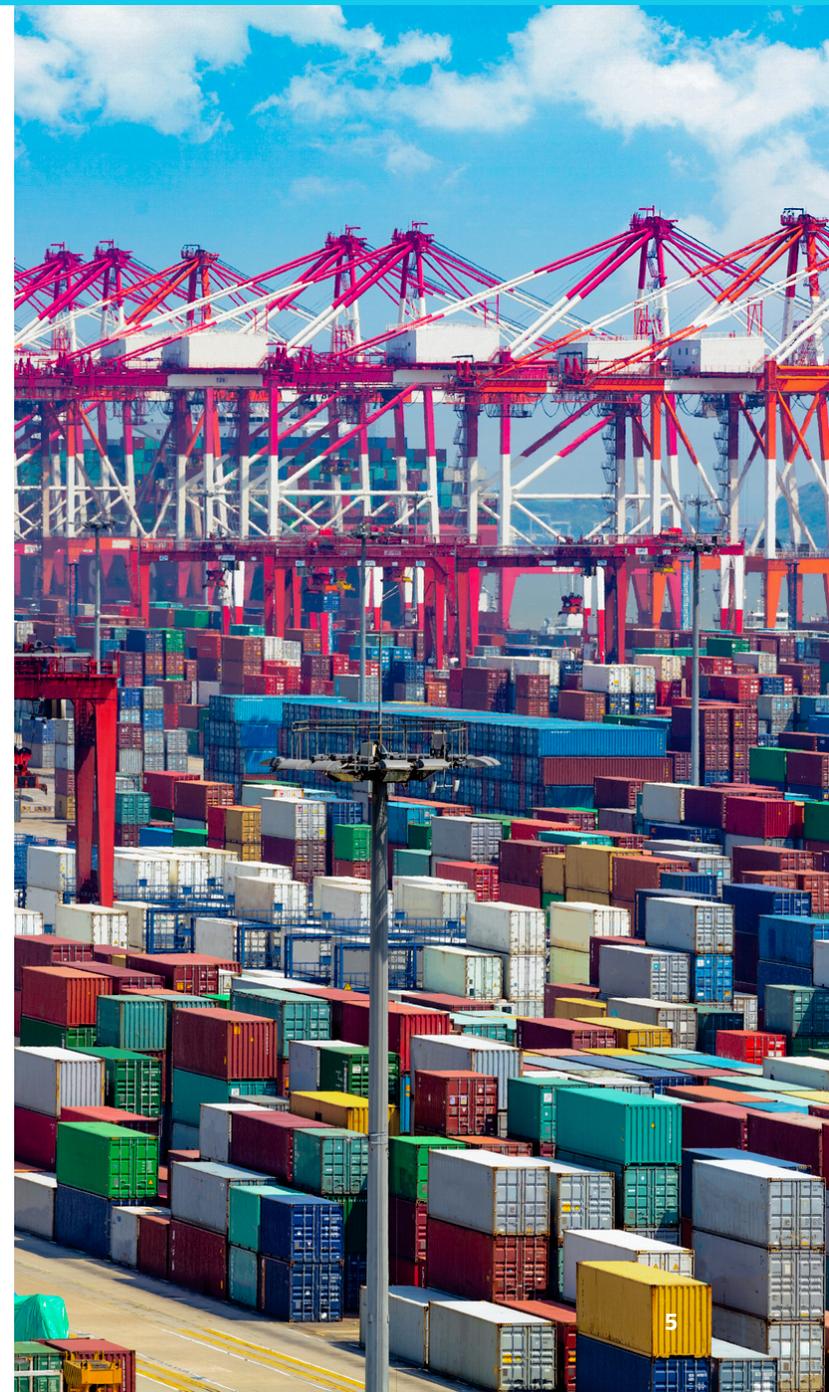
- The U.S. is reducing its reciprocal tariff on goods from Bangladesh
- The U.S. created a new exemption for textile and apparel goods produced in Bangladesh using U.S. produced materials
- Bangladesh will **provide** preferential market access to U.S. industrial and agricultural goods
- Bangladesh will address non-tariff barriers that limit U.S. trade

Pax Silica Declaration



India formally joined the Pax Silica Declaration, a U.S.-led, multinational initiative that aims to strengthen supply chain security by deepening cooperation on artificial intelligence and co-developing methods for mining, processing, and stockpiling critical minerals and rare earth materials.

- The signees currently include Japan, South Korea, the EU, the UK, and Israel.





U.S. Government Increases CDL Oversight

The U.S. Department of Transportation (DOT) and the Federal Motor Carrier Safety Administration (FMCSA) are enacting and enforcing stricter rules around commercial driver's licenses (CDLs).



- **Language Proficiency:** All knowledge and skills tests must now be **administered** in English.
- **Chameleon Carriers:** FMCSA is **targeting** "chameleon carriers," a trucking company that has been shut down, fined, or placed out of service, and then **reappears** under a new company name and DOT number. The agency is using new automation tools to track companies with multiple DOT registrations and help enforcement personnel detect such applications during the registration process.
- **Registry Purges:** The FMCSA has **targeted** >7,000 entry-level driver training (ELDT) providers to crack down on unqualified "CDL mills."
- **Technology Vetting:** 80+ electronic logging devices (ELDs) have been **removed** from the approved list, and >400 recent applications were denied.
- **Dalilah Law:** New legislation would **prohibit** access to CDLs for individuals who are "not citizens or lawful permanent residents of the United States or holders of certain work visas."

Maritime Action Plan

The Trump Administration released a **Maritime Action Plan (MAP)**, detailing strategies to revitalize American shipbuilding and increase U.S. maritime dominance long-term.



Key aspects **include:**

- Increasing the fleet of international commercial vessels sailing under the U.S. flag, as well as domestically between U.S. ports.
- Ensuring access to Arctic waterways while addressing the growing presence of foreign nations throughout this increasingly important trade route.
- Enforcing collection of the Harbor Maintenance Fee and other charges on foreign cargo entering the United States to prevent tariff circumvention via Canada or Mexico.
- Investing in and **expanding** the Maritime Industrial Base and soliciting public and private investment in it.

Mergers & Acquisitions



Hapag-Lloyd Will Acquire ZIM

Two of the world's top ten container shipping companies will merge, pending shareholders' and regulatory approvals. Hapag-Lloyd signed an agreement with ZIM Integrated Shipping Services Ltd., under which Hapag-Lloyd will acquire 100% of ZIM's shares at USD \$35.00 per share, with the total transaction exceeding \$4b. The combined business would involve 400+ vessels and >3m TEUs of capacity.

Transport Technology

Anthropic, a leading artificial intelligence (AI) company, was designated as a supply chain risk by the U.S. government, which directed its agencies and contractors to stop using Anthropic's products.

Ocean Network Express (ONE) announced the launch of its Surcharge Cleanup Project, which aims to simplify ONE's surcharge structure, reducing the number of codes while improving clarity and predictability for shippers.

Sustainability

90+ leading companies, including shipowners, ports, fuel producers, and technology providers, signed a joint statement calling on Member States of the International Maritime Organization (IMO) to adopt the IMO's Net-Zero Framework in 2026.

- Last year, the U.S., Saudi Arabia, and other nations worked to derail the agreement and even threatened other member states if they supported it.
- Other stakeholder nations include Panama, Liberia, and the Marshall Islands, the world's largest "flag states" (where ships are registered), which control almost half of global merchant vessel tonnage.



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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