



Market Report 4/2026



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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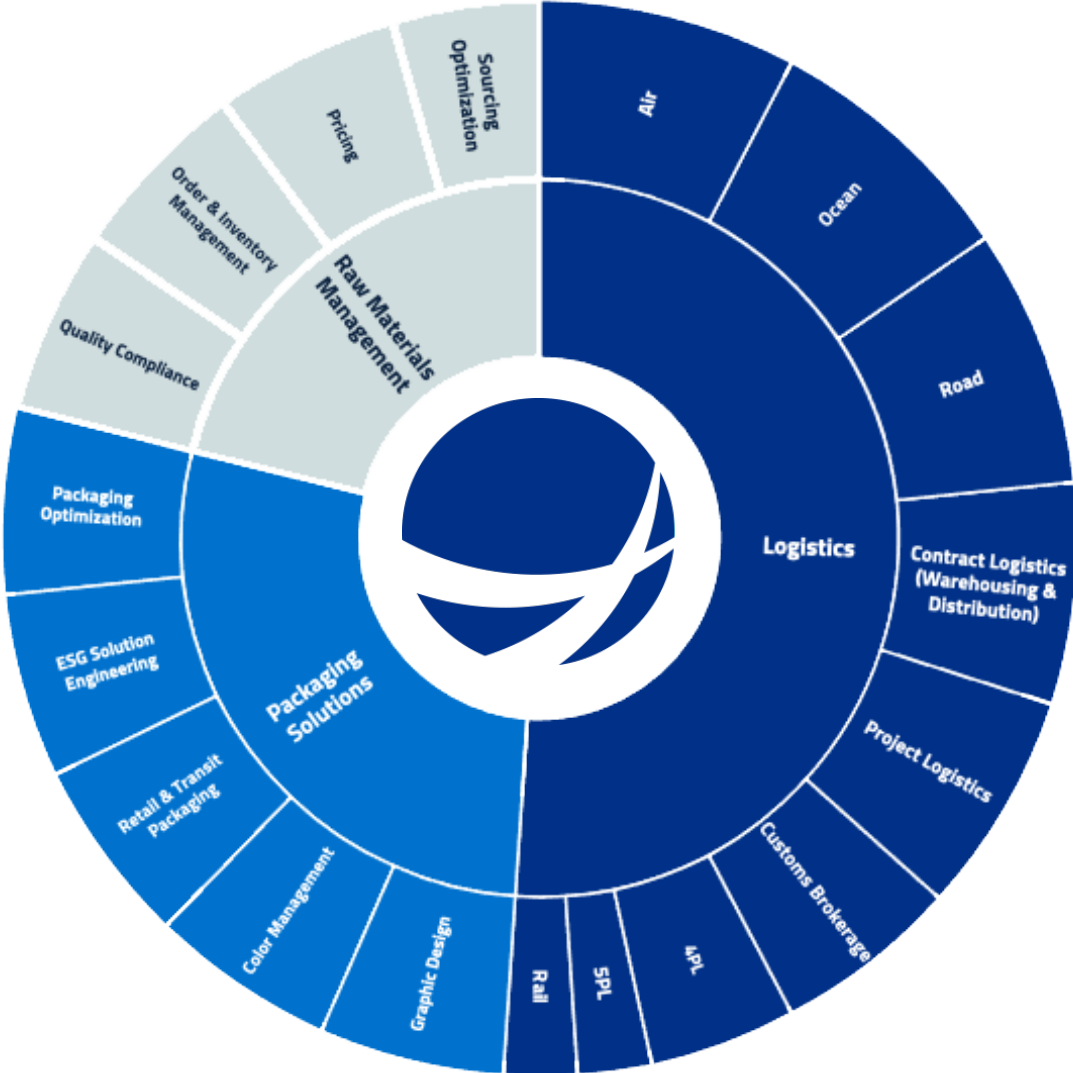


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Market Trends: Strait of Hormuz Crisis



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More than 34,000 ships **diverted** routes during the first four weeks of disruption in the Strait of Hormuz.

The U.S. is **doubling** its financial commitment (now \$40B) to provide reinsurance guarantees for ships willing to travel through the Strait of Hormuz, and has secured new insurance partners, including AIG and Berkshire Hathaway. The U.S. is trying to encourage traffic to resume by easing shippers' worries.

- Dwell times are rising in India, Singapore and China with no indication of stabilization, pushing up container rates on critical east-west routes.
- Rate increases into India, Egypt, and East Mediterranean ports **reflect** the conflict-driven disruption in the Middle East.
- Carriers are actively **designing** new multimodal solutions that combine sea, rail, and road transportation to circumvent the affected areas.
- COSCO **resumed** new booking services for ordinary freight containers from the Far East to the Middle East.

Asia's Unique Exposure

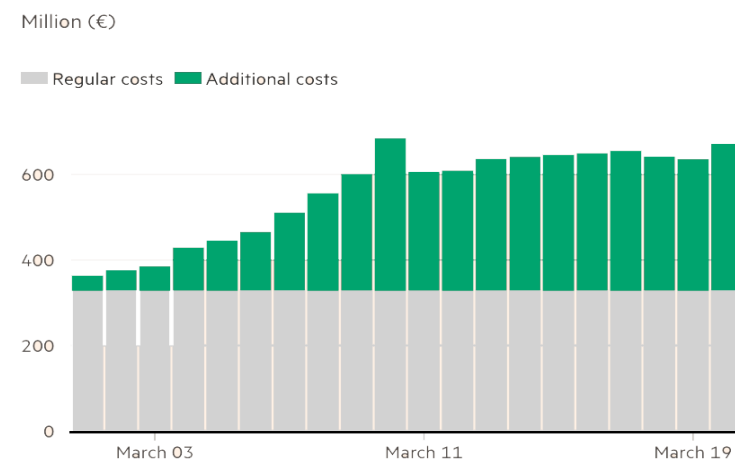
Asian governments are taking defensive measures to prevent fuel shortages since about 90% of the oil and 83% of the liquefied natural gas that normally passes through the Strait of Hormuz goes to Asia, making the region uniquely dependent on these energy shipments.

- China has intentionally curbed fuel exports to secure its supply
- Airlines are **drawing up** contingency plans to deal with potential jet fuel shortages as aviation executives have struggled to get assurances about the availability of fuel beyond the next month.
- Many air carriers in the East—Air India, Cathay Pacific, Thai Airways, Qantas, etc.—have already announced plans to **raise fares** or add surcharges to tickets to cover the higher costs.
- Air China, China Eastern, and China Southern, are uniquely vulnerable to fuel costs as they largely **lack fuel hedges** and cannot pass on costs to domestic travelers.
- Chinese carriers have increased flights to and from Europe, filling a gap left by Gulf carriers, but they are still losing investor confidence due to soaring fuel costs

Jet Fuel Costs Impact Trade Patterns

Wholesale jet fuel prices have more than doubled since the start of the conflict, surging past the previous records set after Russia invaded Ukraine. Jet fuel is particularly exposed to disruption because it can only be stored for about a year before it starts to degrade, depending on storage conditions.

The crisis is adding more than €300M a day to shipping fuel costs.



Source: T&E (2026), based on Clarkson's World Fleet Register and Stratias Advisors. Fuel costs are sales-weighted by fuel type, mixture and bunkering location: 458 €/t VSLFOeq for conventional liquid fuels, 517 €/t VSLFOeq for LNG

More Information

West African ports are now routinely handling larger container vessels (10,000+ TEUs), demonstrating rapid growth in regional shipping capacity.

Just a decade ago, vessels of around 3,500 TEUs were the norm. Key ports in this region include Lagos, Lekki, Tema, Abidjan, Kribi, and Lome.



Hapag-Lloyd will invest about \$1B in India. The expansion program **includes** reflagging four ships to the Indian registry, ship recycling efforts, and developing terminal infrastructure at Vadhavan, a deepwater harbor project about 100 miles north of Mumbai.



In the past month, Intra-Asia carriers, emboldened by higher rates and consistent demand, have placed a flurry of new vessel orders totaling more than \$1B. China-Vietnam trade remains salient in the area, with volumes growing 16% last year to 2.8M TEUs.

Vietnam has **overtaken** China as the top source for **electronics** into the U.S., although the core production of those electronics is still happening in China.

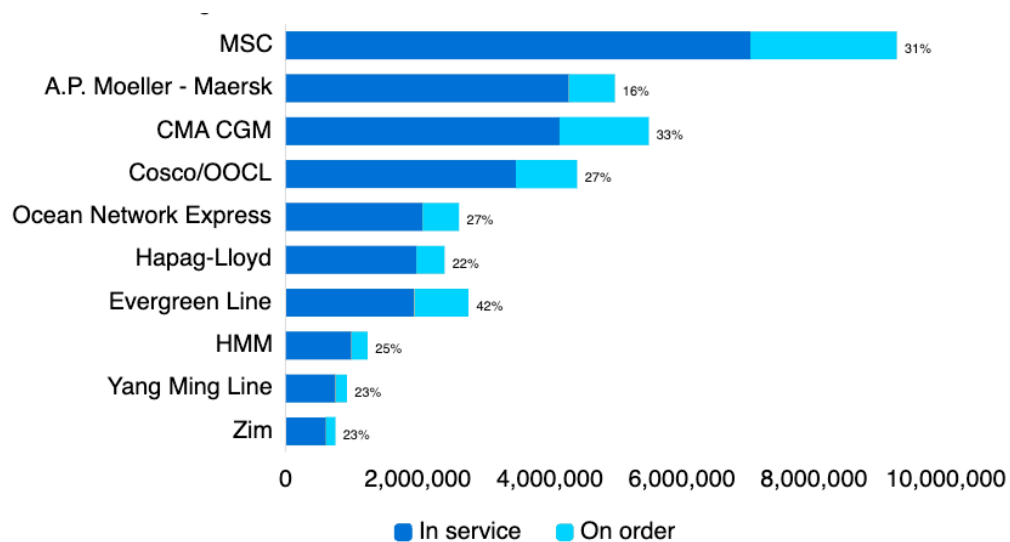
- China's shipments to the U.S. fell by \$51B in 2025, but this was largely offset by the United States cumulative \$49B rise in imports from other key trade partners like Vietnam, India, and Mexico.



Largest Ocean Carriers Continue Domination

The world's largest ocean carriers are pursuing relentless growth in strategic ways. Leading container liners are aggressively acquiring terminals and the ships to run regional and feeder systems off those terminals.

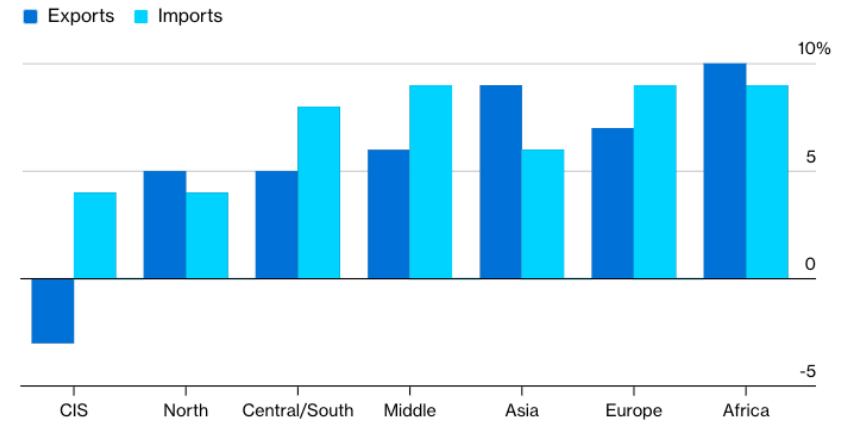
- Evergreen continues to grow order book
- CMA CGM is closing in on Maersk with its orderbook



Source: Sea-web, S&P Global.

Regional Trade Trends in 2025

North America trailed other major economies amidst U.S. tariffs and geopolitical uncertainty.



Note: % change in USD \$ values. Source: World Trade Organization, Bloomberg.

Pathways



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**.



-  Mexico's **Interoceanic Corridor of the Isthmus of Tehuantepec** (CIIT) will be finished soon, with final construction **expected** in June this year. The CIIT project **creates** multimodal options, integrating services from Mexico's National Port System and local administrations with the Tehuantepec Railway.
 - CIIT will serve as a long-term alternative to the Panama Canal, which is expected to continue facing droughts that will disrupt operations.

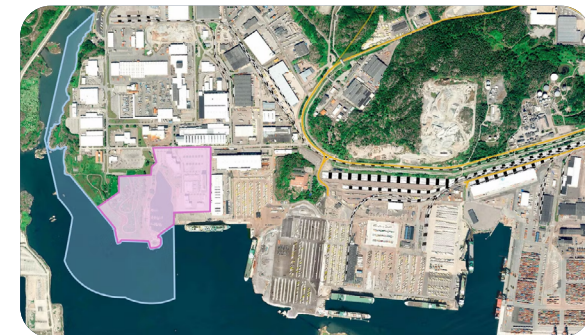
-  Landlocked Laos **will gain direct access** to a major port as a new 562km standard-gauge railway in the Laotian capital (Vientiane) will connect with the Vung Ang deep water port on the coast of Vietnam. Daily freight traffic is estimated at >5,000 tons initially, rising to 47,133 tons later.

-  Vietnam's government **approved** a new container terminal near Danang, the country's third-largest city. Maersk subsidiary APM Terminals and local infrastructure developer Hateco Group have been awarded a 50-year lease to develop the \$1.7B Lien Chieu Container Port.
 - In its first phase, the deep-sea port will have an annual capacity of 4M TEUs, a total quay length of 2,750 meters, and eight container berths capable of handling vessels up to 18,000 TEUs in size.
 - Once fully developed at the end of phase three, the port will have an annual capacity of around 5.7M TEUs.

-  Argentina **finalized** an infrastructure framework for a \$4B rail corridor connecting its mining basins in San Juan and Mendoza to the energy basin at Vaca Muerta, with links to Pacific Ocean ports in Chile.



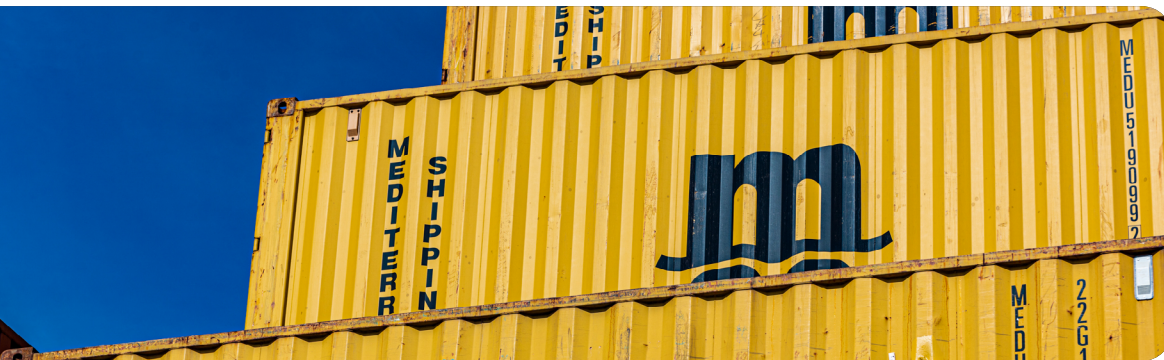
The Port of Gothenburg (Sweden) **acquired** another large land area (210,000 square meters) in its outer port zone as part of its long-term expansion strategy.





Saudi Ports Authority (Mawani) says **operations have started** at the new container terminal in Jubail Commercial Port. The terminal's annual capacity has grown from 1.5M TEUs to 2.4M TEUs across a total area of 460,000 square meters.

- Quay length extended from 1,000 meters to 1,400 meters
- Berth depth increased from 14 meters to 18 meters
- New ship-to-shore (STS) cranes and rubber-tyred gantry (RTG) cranes



Mediterranean Shipping Company (MSC) **will develop** a new container terminal at Snake Island Port (SIP) in Lagos, Nigeria, as part of MSC's >\$1B of investment in Nigeria's logistics sector.

- The terminal is **designed** with a 910-meter quay capable of handling ship-to-shore (STS) cranes and Mobile Harbour Cranes (MHC) for both deep-sea vessels and barges.
- The initial dredging depth is 16.5 meters, matching the current depth of the navigation channel.



Tazara & Lobito Projects in Direct Competition

Two major infrastructure projects will connect the same mineral-rich region of central Africa to key ports on the west coast.

Chinese companies plan to upgrade the 1,860km rail line to Dar es Salaam in Tanzania, known as the Tazara railway. These efforts would ease congestion on roads in Zambia and Congo and link Zambia's copper region to a port on the Indian ocean.



The Tazara link will directly compete with the Lobito Corridor, a rail project backed by the U.S. and EU.

In Dec. '25 the U.S. signed a bilateral minerals partnership with the Democratic Republic of Congo that grants American companies preferential access to abundant reserves of metals.

OIA's Recent Acquisitions



Cargo Services, Inc. (CSI), is an established international freight forwarding and customs brokerage firm headquartered in Indianapolis, Indiana. The company has longstanding customer relationships across key manufacturing and industrial sectors.

"At OIA, service is everything—and what stood out about Cargo Services is that they operate the same way. You can see it in how long their customers have been with them. Connecting that with OIA's global network is going to create real value for customers on both sides."

= Mabel Rodriguez, Managing Director, Americas

[Learn More](#)



About Freight Worldwide, (AFW) is a premier freight forwarding and customs clearance provider headquartered in Auckland, New Zealand. With more than two decades of delivering precision logistics with a personal touch, AFW has earned long-standing customer relationships across the industrial, automotive, consumer, and pharmaceutical sectors.

"This acquisition is an important milestone for our presence in New Zealand and a testament to the strength of our regional strategy. Dave and his team have built a business that mirrors everything we stand for: exceptional service, trusted customer relationships, and an unwavering commitment to getting it right."

-Jeff Barrie, Chief Executive Officer of OIA Global

[Learn More](#)

IEEPA Tariff Refunds & CAPE Phase 1

U.S. Customs has established a new process—the Consolidated Administration & Processing of Entries (CAPE) system—to refund importers for voided International Emergency Economic Powers Act (IEEPA) tariffs.

The Consolidated Administration & Processing of Entries (CAPE) system consists of four steps:

1. Claim submission
2. Mass processing
3. Review and liquidation/reliquidation
4. Refund delivery

The agency **estimates** that it is 45-80% finished with development and testing of the four components. While CAPE represents progress, Phase 1 is limited in scope. Key questions **remain** around eligibility, timing, and how CAPE may interact with existing strategies, such as filing protests.

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)



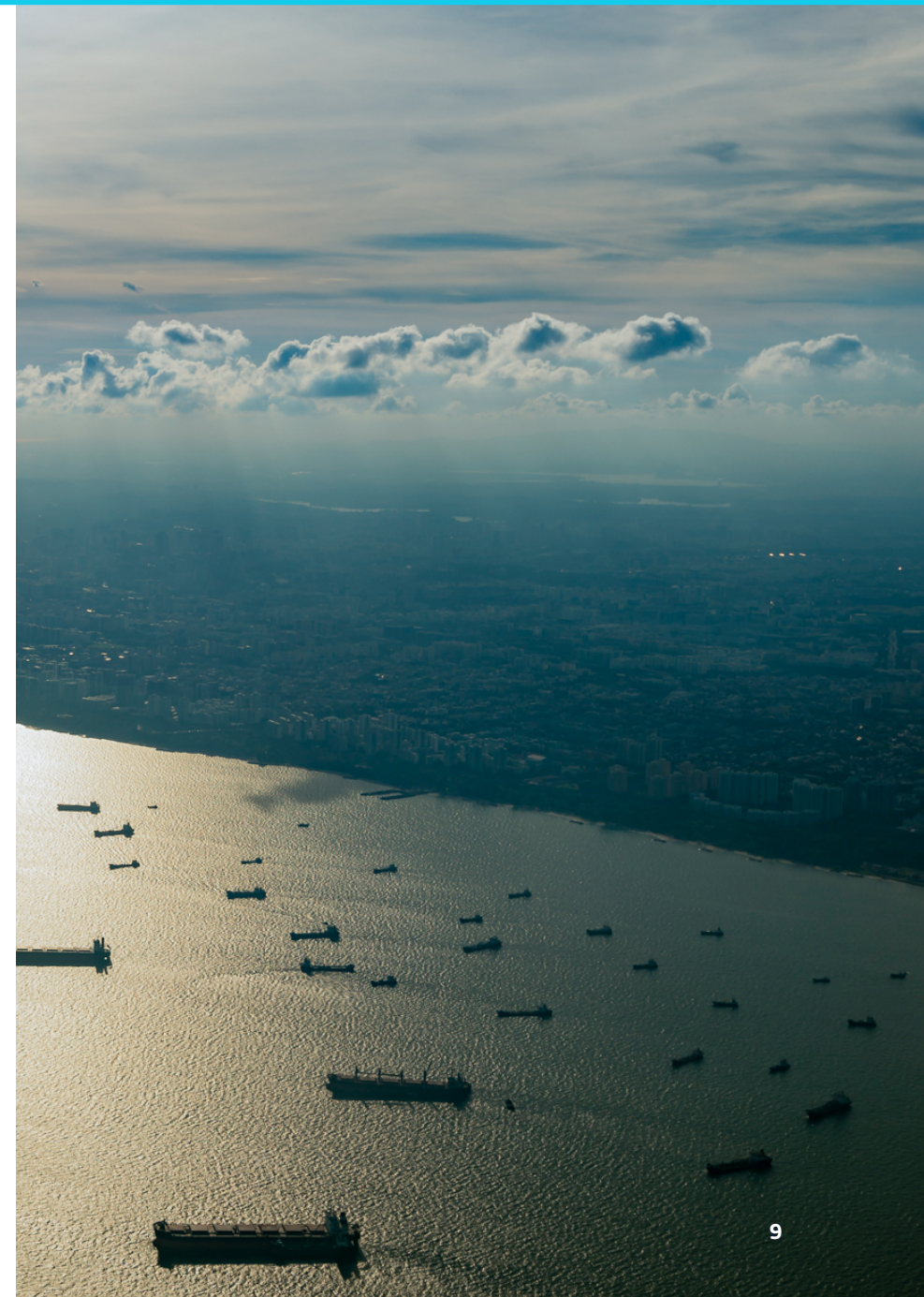
EU customs authorities are **increasing scrutiny** of small-parcel and e-commerce shipments in preparation for the next wave of digitalization reforms. Traders moving low-value consignments should expect more frequent document requests, tighter data verification, and delays if product information is incomplete or inconsistent.



Pax Silica

The U.S. will **contribute** \$250M toward an investment consortium of global trade partners. The fund is part of a broader U.S.-led supply chain alliance known as **Pax Silica**, which is designed to strengthen supply chains for energy and critical minerals and secure advanced manufacturing. The strategic initiative is also **designed** to help the countries avoid “single points of failure” within the global supply chain.

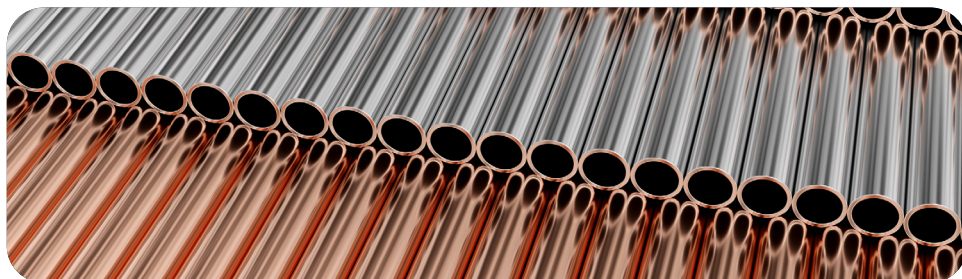
- Pax Silica currently includes Japan, India, South Korea, the UK, United Arab Emirates, Qatar and Singapore among its members.





Section 232: Metals

Effective April 6th, 2026, 12:01 a.m. EST



The U.S. will maintain a 50% import tariff on steel, aluminum, and copper commodity imports, but cut duty rates on derivative products made with these metals.

- Tariffs will now be **assessed** based on the full value of imported goods—not reduced foreign pricing.
- Goods containing 15% or less of these metals are no longer subject to Section 232 tariffs.

50% - Goods made entirely or almost entirely of steel, aluminum, or copper (coils, sheets, etc.)

25% - Derivative products substantially made of these metals

15% - Certain metal-intensive industrial and electrical grid equipment

10% - Products manufactured abroad using entirely U.S.-origin metals

Section 232: Pharmaceuticals

Effective July 31st, 2026, 12:01 a.m. EST for larger companies

Effective September 29th, 2026, 12:01 a.m. EST for smaller companies



100% tariff on patented pharmaceutical products and ingredients.

Reduced tariffs (15%) apply to certain places: the EU, Japan, Korea, Switzerland, Liechtenstein, and the UK.

0% tariff available through Jan. 20th, 2029, for companies entering Most Favored Nation (MFN) pricing agreements with the U.S. Department of Health & Human Services, or those signing onshoring agreements with the Department of Commerce. 20% tariff applies if only the onshoring agreements are executed.

[More Information](#)

Mergers & Acquisitions

Mediterranean Shipping Co. (MSC)—already the world’s largest container line—filed to **acquire** 50% of Sinokor Maritime, which **operates** a fleet of 78 very large crude carriers (VLCCs). Korean tycoon Ga-Hyun Chung will retain the other 50%.



Deutsche Lufthansa AG and Air France-KLM **submitted** bids for a stake in TAP SA, with the Portuguese government ready to sell as much as 49.9% of its flag carrier.

- TAP has a fleet of 102 planes, mostly from Airbus SE, with 92 currently in service.
- British Airways **backed out**, with the company’s owner, International Airlines Group (IAG), telling the Portuguese government it will not bid unless rules that prevent it from taking majority control are relaxed.

Transport Technology

The International Maritime Organization (IMO) **approved** a **global strategy on maritime digitalization**, with mandatory cybersecurity measures. The framework promotes interoperability, system standardization, data sharing, and governance across administrations, industry, and seafarers.

Japan Engine Corporation and Kawasaki Heavy Industries **demonstrated** a large **hydrogen-fueled engine in a commercial ocean-going vessel**. Notably, most hydrogen engines have been used on smaller coastal vessels, making this a major technological milestone.

HD Hyundai, the world’s largest shipbuilding group, is **developing** humanoid **robot technology to perform precision tasks at its shipyards**, most notably, welding. The Korean company has completed a positive evaluation of a prototype’s technical feasibility and on-site applicability, and the project is now moving to the next phase.

A **new report** projects 170,000 **self-driving trucks** on U.S. highways by 2035 — roughly 15% of the total trucking market. The analysis also **projects** \$9B in annual consumer savings.



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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