

NAVIGATING THE FUTURE OF MARITIME TRADE

Why **\$14 Trillion** of the world's containerised goods depend on 'Connected Trade Corridors'.



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FOREWORD

A PERSPECTIVE ON THE FUTURE OF MARITIME TRADE AND THE RISE OF CONNECTED TRADE CORRIDORS.

Maritime trade is the foundation of the global economy. Today, **more than 80% of world merchandise trade by volume is transported by sea², connecting businesses, industries and communities** across every continent. Yet the conditions that shaped global trade over the past three decades are changing more rapidly now than at any point in recent history.

Geopolitical tensions, evolving trade policies, climate-related disruption and shifting manufacturing footprints are reshaping how cargo moves around the world. These are not isolated challenges. Together, they represent a structural shift in the way global trade is organised. Businesses' main concern used to be the efficient movement of cargo from origin to destination. Increasingly, they are asking a different question: How resilient is the network when disruption occurs?

That change in perspective reflects a broader transformation taking place across maritime trade. Resilience is no longer simply a contingency plan. It has become a strategic capability that influences competitiveness, customer confidence and long-term growth.

In this whitepaper, we explore the forces redefining global trade and the capabilities that businesses will need to succeed. We argue that the future will not be shaped by individual shipping routes, ports or transport modes operating independently.

Instead, competitive advantage will increasingly depend on what we call 'Connected Trade Corridors' - resilient trade ecosystems that integrate shortsea and coastal shipping, feeder and port services, marine operations, ports, inland waterways, multimodal transport and digital intelligence to keep global trade moving as conditions change.

This is more than an evolution in logistics. It represents a fundamental shift in enabling global commerce. As manufacturing expands into new regions, trade corridors diversify and customer expectations continue to evolve, businesses will require integrated ecosystems capable of adapting quickly while maintaining continuity across increasingly complex supply chains.

The organisations that embrace this shift will be best positioned to respond to uncertainty, unlock new opportunities and support the next generation of global trade.



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² <https://unctad.org/meeting/multi-year-expert-meeting-transport-trade-logistics-and-trade-facilitation-12th-session>

CHAPTER 1

THE EVOLVING MAP OF MARITIME TRADE

Maritime trade is the engine of global commerce. The networks carrying an estimated \$14 trillion worth of containerised goods are being tested by geopolitical disruption, climate pressures and changing trade policies. Every day thousands of vessels connect manufacturers with markets, move critical raw materials, support industrial production and enable consumers to access goods from around the world.



THE BACKBONE OF GLOBAL TRADE



More than
FOUR-FIFTHS
of global merchandise trade by
volume is transported by sea³

This makes maritime transport one of the world's most important economic enablers. For decades, this system operated in a relatively predictable environment.

Stable geopolitics, established shipping routes and concentrated manufacturing hubs enabled businesses to optimise supply chains around efficiency, cost and scale. Larger vessels, integrated trade agreements and increasingly sophisticated logistics networks transformed the movement of goods, helping global trade to expand at an unprecedented pace.

RESILIENCE RESHAPES THE MAP

Today, the landscape is fundamentally different. Geopolitical tensions and conflicts, shifting trade policies and tariffs, climate-related disruption and the redistribution of manufacturing are reshaping global trade. Established shipping lanes are under pressure, new production centres are gaining greater significance and businesses face a once-in-a-generation redesign of global supply chains to improve resilience rather than to simply maximise efficiency.

The World Trade Organisation (WTO) warns⁴ that this is not a temporary period of disruption. It is a structural reset of global trade. The implications extend far beyond the maritime sector. They influence where businesses invest, how products are sourced, where factories are built and how supply chains are designed.

Taken together, they are driving a long-term reconfiguration that is changing where cargo moves, how supply chains are designed and the steps organisations must take to remain competitive. Increasingly, the resilience of maritime networks will shape the competitiveness of industries far beyond shipping itself.

THE RISE OF CONNECTED TRADE CORRIDORS

Global trade is moving beyond an era defined by concentrated production and established east-west routes towards a more distributed, interconnected model, where geopolitical change, shifting policy and climate disruption are making flexibility and resilience as critical as efficiency.

The traditional arteries of maritime trade remain fundamental. Asia–Europe, the Trans-Pacific and Transatlantic routes continue to carry enormous volumes of cargo, while Asia remains at the centre of global liner connectivity. But around these established networks, a more complex geography is emerging.

Trade between developing economies is accelerating. Manufacturing is spreading across India and Southeast Asia. Asia–Africa and Asia–Latin America connections are strengthening. The Gulf is assuming a greater role as an interconnector between markets. And multimodal alternatives across Eurasia and the Arctic are attracting renewed attention as businesses seek greater routing optionality. The result is not the replacement of one dominant route by another. It is the emergence of a more diversified network of Connected Trade Corridors.

While maritime trade's geography is becoming more fluid, established routes will remain vital. However, growth will increasingly depend on the ability to integrate emerging markets, alternative gateways and multimodal corridors into resilient networks.

Against this backdrop, competitive advantage will come from building Connected Trade Corridors that provide greater optionality, stronger regional connectivity and the flexibility to adapt when disruption occurs.



³ <https://unctad.org/meeting/multi-year-expert-meeting-transport-trade-logistics-and-trade-facilitation-12th-session>

⁴ https://www.wto.org/english/blogs_e/ce_ralph_ossa_e/blog_ro_16apr25_e.htm

TRADE LANES EXPLAINED

ESTABLISHED CORRIDORS

ASIA-EUROPE: DELIVERING DYNAMIC ADVANTAGE

Asia-Europe remains one of the world's most important maritime corridors, but recent disruption shows that even established routes can no longer be treated as fixed. UNCTAD⁵ estimates that vessel rerouting pushed global shipping ton-miles up 5.9% in 2024, while by May 2025, tonnage passing through the Suez Canal remained around 70% below 2023 levels.

As security conditions evolve, the ability to switch between Trans-Suez and Cape of Good Hope routings is becoming a strategic asset. The advantage is increasingly not simply access to the shortest route, but the ability to change routes while maintaining continuity.

INTRA-ASIA: FROM FEEDER MARKET TO STRATEGIC NETWORK

Intra-Asia is becoming a key trade network. Asia's merchandise exports increased 12.9% year-on-year in volume in Q1 2026⁶, while imports rose 14.6%, according to the WTO. In value terms, Asian merchandise exports rose 20% and imports 22%, reflecting strong regional demand and investment, particularly in machinery, electrical equipment and AI-related industries.

At the same time, manufacturing is becoming more distributed across China, Vietnam, Indonesia, Malaysia and India. This trend is increasing the importance of feeder, coastal and shortsea services that connect multiple production centres with regional hubs and deep-sea trade lanes.

ASIA-NORTH AMERICA: THE TRANS-PACIFIC BROADENS

The Trans-Pacific is a core global artery, but the underlying sourcing model is changing. It is instructive to think about the route as Asia-North America, rather than simply China-North America, as manufacturing spreads across a wider group of Asian economies. The first quarter of 2026⁷ reflected this shift, with Asian exports continuing to grow strongly while North American trade patterns adjusted following significant front-loading ahead of tariff changes in 2025.

⁵ <https://unctad.org/publication/review-maritime-transport-2025>

⁶ https://www.wto.org/english/news_e/news26_e/rese_31jul26_469_e.htm

⁷ https://www.wto.org/english/news_e/news26_e/rese_31jul26_469_e.htm

TRADE LANES EXPLAINED

FAST-GROWING CORRIDORS

ASIA-LATIN AMERICA: STRENGTHENING CONNECTIVITY THROUGH INVESTMENT

Asia-Latin America is growing in significance. South and Central America's merchandise exports increased 14% in value year-on-year in Q1 2026⁸, supported by commodities, agricultural products and energy, alongside growing flows of manufactured goods, machinery, automotive products and electronics from Asia.

Investment in Pacific-facing infrastructure, including Peru's Chancay development, is strengthening direct connectivity with Asia. The corridor is increasingly becoming an important component of wider South-South trade.

SOUTH-SOUTH TRADE: A DEFINING SHIFT IN GLOBAL COMMERCE

The growth in South-South trade is one of the defining shifts in global commerce. UNCTAD⁹ estimates that merchandise exports between developing economies grew from around US\$0.5 trillion in 1995 to US\$6.8 trillion in 2025, with approximately 57% of exports from developing countries destined for other developing markets.

This means global trade can no longer be understood primarily through flows between Asian manufacturing hubs and Western consumer markets. Increasingly, growth is being generated between Asia, Africa, the Middle East and Latin America, creating demand for stronger regional hubs, feeder services and inland connectivity.

ASIA-MIDDLE EAST-AFRICA: THE GULF AS AN INTERCONNECTOR

The Gulf's strategic value¹⁰ increasingly lies in its ability to connect Asia, Africa and Europe through maritime gateways, inland transport, free zones, warehousing and regional distribution. At the same time, geopolitical disruption has highlighted the need for greater resilience and alternative routing options.

In 2026, DP World activated alternative UAE gateways, fast-tracked bonded inland corridors and added 700 trucks¹¹, creating capacity for up to 35,000 additional trips each month. Regional land bridges provided alternatives from the Arabian Sea and Red Sea while keeping cargo in the same commercial, customs and digital ecosystem – a practical example of multi-gateway, multimodal resilience.

⁸ https://www.wto.org/english/news_e/news26_e/rese_31jul26_469_e.htm

⁹ <https://Source:%20https://unctad.org/publication/global-trade-update-january-2026-top-trends-redefining-global-trade-2026>

¹⁰ https://www.wto.org/english/news_e/news26_e/rese_31jul26_469_e.htm

¹¹ <https://www.dpworl.com/en/news/releases/uae/dp-world-strengthens-gcc-logistics-network-with-700-new-trucks>

TRADE LANES EXPLAINED

ALTERNATIVES TO CONVENTIONAL CORRIDORS

IMEC: FROM CONCEPT TO CONNECTED OPERATING MODEL

The India–Middle East–Europe Economic Corridor (IMEC)¹² represents a shift from single-mode routes towards integrated trade ecosystems, combining maritime, rail, road, energy and digital infrastructure between India, the Gulf and Europe.

Once operational, its success will depend on connecting today's somewhat fragmented segments through common governance, interoperable systems and smoother cargo handovers. Initiatives such as the India–UAE MAITRI¹³ platform and Virtual Trade Corridor are beginning to create the digital foundations that are needed for greater end-to-end interoperability.

THE MIDDLE CORRIDOR: MULTIMODAL OPTIONALITY GAINS IMPORTANCE

The Trans-Caspian International Transport Route, or Middle Corridor, is gaining strategic relevance as a multimodal alternative linking China and Central Asia with the Caspian Sea, the Caucasus, Türkiye and Europe.

Investment in rail, intermodal hubs and Caspian and Black Sea connectivity is strengthening its potential. However, its effectiveness will depend on more than infrastructure: border processes, vessel schedules, rail capacity and customs systems must all function as a connected ecosystem.

THE NORTHERN SEA ROUTE: AN ALTERNATIVE TO CONVENTIONAL CORRIDORS

The Northern Sea Route¹⁴ should also appear on the 2026 map, but clearly distinguished as an emerging and seasonal corridor, rather than a substitute for Suez. The Northern Sea Route is attracting greater attention as an alternative between Northeast Asia and Northern Europe. Under suitable conditions, it can materially shorten the distance between the two regions.

However, seasonal accessibility, ice conditions, infrastructure limitations, insurance costs, environmental concerns and geopolitical risk mean it is an emerging option. Its significance lies in showing how even the geography of trade is becoming more fluid.

¹² <https://www.indembassyuae.gov.in/pdf/New%20impetus%20to%20IMEEC-03-02-2025.pdf>

¹³ <https://government.economictimes.indiatimes.com/news/psu/strengthening-india-uae-digital-trade-rites-maitri-workshops/122058735>

¹⁴ <https://www.reuters.com/world/china/south-korea-ship-test-arctic-commercial-route-amid-western-concerns-2026-08-22/>

CHAPTER 2

THE MARKETS SHAPING NEW PATHWAYS

Global trade is moving beyond an era defined by concentrated production and established east-west routes towards a distributed, interconnected model. As companies seek greater choice in where they source, how they route cargo and which gateways they use, new markets are gaining strategic importance. Geopolitical change, shifting trade policy and climate disruption are accelerating this shift, making optionality and resilience as critical as efficiency.





Strategic chokepoints such as the Suez and Panama Canals, the Strait of Hormuz and Bab el-Mandeb will remain central to global commerce, but recent disruptions have exposed the risks of overdependence on a small number of gateways. Rather than replacing established pathways, businesses are building greater flexibility into supply chains through alternative routes, multiple transport modes and the ability to switch routes when conditions change.

INDIA AT THE HEART OF TRANSFORMATION

Few countries illustrate this reconfiguration more clearly than India. Supported by sustained economic growth, expanding industrial capacity and continued investment in logistics infrastructure, India is strengthening its position in global manufacturing and maritime trade. New trade agreements, dedicated freight corridors and investment in port connectivity are reinforcing India's role as a production hub and a strategic gateway linking Asia, the Middle East, Africa and Europe.

SOUTHEAST ASIA'S EXPANDING MANUFACTURING BASE

Across Southeast Asia, investment in manufacturing continues to diversify. Vietnam, Indonesia and Malaysia are strengthening their positions within global supply chains as businesses seek greater geographic diversity and reduced dependence on single-country sourcing. This shift is generating new regional shipping patterns and increasing demand for flexible logistics networks capable of connecting multiple manufacturing locations with global trade routes.

HOW AFRICA IS RESHAPING TRADE FLOWS

Africa is playing an increasingly central role in the future geography of maritime trade. Rapid population growth, industrialisation and the implementation of the African Continental Free Trade Area (AfCFTA) are strengthening regional commerce while creating new opportunities for international trade.

At the same time, growing commercial links between Asia and Africa are reshaping trade flows across the Indian Ocean and along Africa's eastern and western seaboard. These developments reinforce the importance of investment in ports, inland logistics, feeder connectivity and multimodal transport that connects expanding industrial centres with global markets.

THE MIDDLE EAST: OPTIONALITY IS KEY

The Middle East remains a critical junction for trade between Asia, Europe and Africa, but recent disruption has shown that geography alone does not guarantee resilience. Geopolitical tensions around key chokepoints such as the Strait of Hormuz highlight the need for alternative gateways, multimodal connectivity and operational flexibility.

In 2026, DP World activated Khorfakkan and Fujairah for exactly this purpose, while Jebel Ali remained the commercial and customs destination, supported by rail, road and government coordination. Similarly, corridors linking Jeddah to the GCC, Asia to the GCC via Oman, and Europe to the Gulf through Türkiye were developed, alongside proposed capacity expansion at Al Rugaylat and Dibba - all designed to strengthen optionality as conditions evolve.

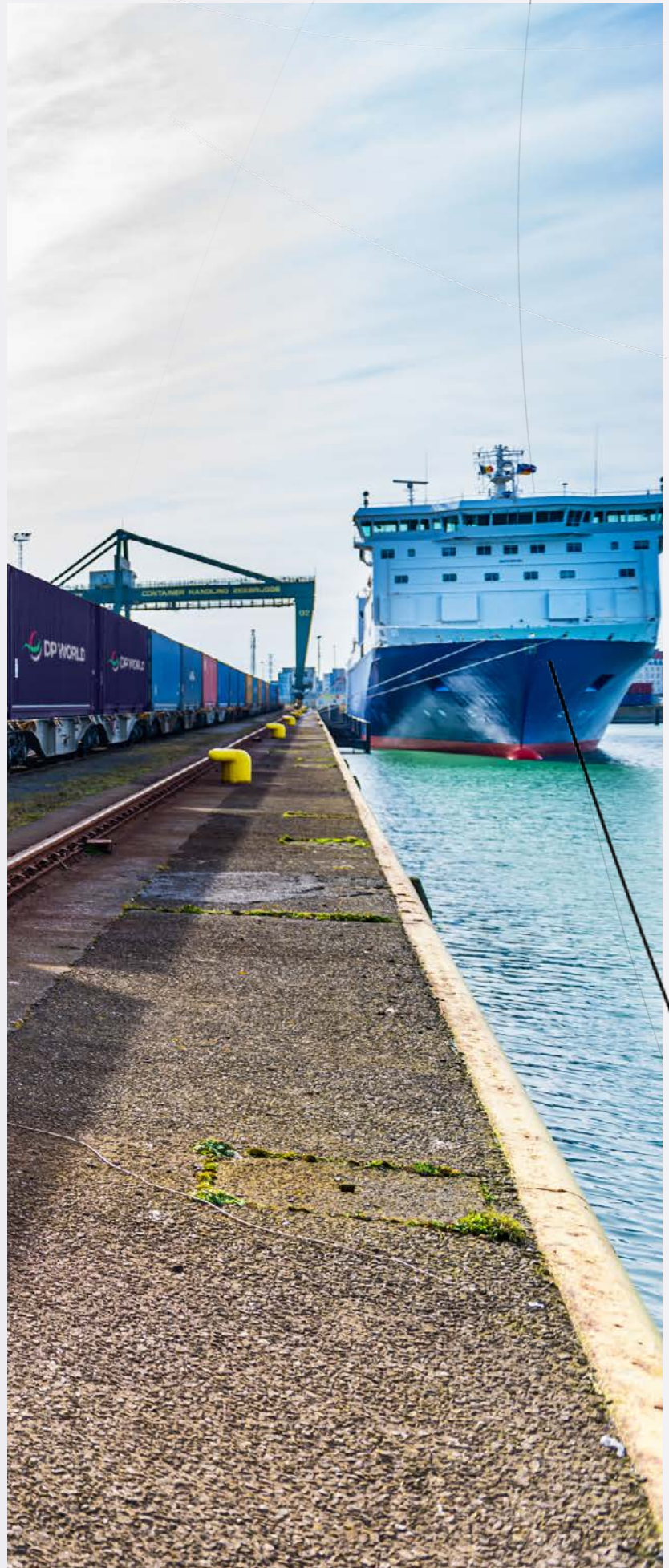
LATIN AMERICA: DEEPENING TIES WITH ASIA

Latin America is also gaining importance, supported by strong commodity exports, expanding manufacturing and deeper commercial ties with Asia. Pacific-facing markets are experiencing two-way growth in flows across agriculture, energy, raw materials, machinery, electronics and vehicles.

Investment in port infrastructure, shortsea and feeder services, and new Pacific gateways are improving direct connectivity with Asia. This creates more routing options and strengthens Latin America's role in South-South trade and more broadly in global supply chain diversification.

THE STRATEGIC VALUE OF RESILIENCE AND FLEXIBILITY

The next generation of trade opportunity will emerge from markets that offer greater choice in sourcing, routing and gateways. India, Southeast Asia, Latin America, Africa and the Middle East are becoming increasingly important not only because of their growth potential, but because they add flexibility to the global trading system. Competitive advantage will lie in connecting these markets through resilient, multimodal networks that can adapt in a changing environment.



CHAPTER 3

MANUFACTURING HUBS DRIVE SUPPLY CHAIN DIVERSIFICATION

Against the backdrop of expanding manufacturing capabilities in Southeast Asia, South Asia, Latin America, the Middle East and Africa, the latest findings from DP World's Global Trade Observatory show that increasingly, businesses are evaluating alternative trade routes.

Executives cite¹⁵ better transport connectivity (36%) improved customs procedures (35%) and the avoidance of geopolitical chokepoints (27%) as the key reasons why they change how goods move through global supply chains.

**36%**

better transport connectivity

**35%**

improved customs procedures

**27%**

avoiding geopolitical chokepoints

¹⁵ <https://dpw-p-001.sitecorecontenthub.cloud/api/public/content/2299648c2ebb434f9fc6309fb06f434d?v=96adebf7>

The move towards dispersed production contrasts with previous strategies, which had focused on concentrating manufacturing capabilities in a small number of established markets. This structural shift is designed to reduce the risk of dependence on a limited number of production bases while improving access to growing consumer markets. It is leading to more diversified supply chains and the emergence of new shipping corridors.

VIETNAM

Vietnam illustrates how the redistribution of manufacturing impacts maritime patterns. European and US consumer brands are locating production capabilities in the Southeast Asian country. This has led to a sharp increase in Vietnam's textile and garment exports, rising in value to US\$46 billion in 2025¹⁶, a 5.6% increase compared with 2024. In 2025, Vietnam exported US\$421.47 billion in manufactured products¹⁷ an 18% increase on 2024.

This expansion has also strengthened demand for regional feedering to mainline services and inland factory-to-port connectivity. It also means that the growth in maritime routes in Asia is not confined to China, with exporters shipping direct to Europe and the US as well as through intra-ASEAN feeder corridors.

Similar developments are taking place in other Southeast Asian countries, where interconnected production hubs are driving higher volumes of intra-regional trade alongside long-haul exports to Europe and North America.

For example, Indonesia's EV manufacturing capabilities are expanding¹⁸, while Malaysia's semiconductors and electronics production base is growing.¹⁹



US\$46B

Vietnam's textile and garment exports in 2025

5.6%

increase compared with 2024



US\$421.47B

Vietnam's manufactured products exports in 2025

18%

increase on 2024

INDIA

India's role as a manufacturing and export hub is assuming greater prominence. Sustained investment in industrial capacity and supporting logistics corridors²⁰, new trade agreements and closer commercial alignment with major export markets reinforce the growing strategic importance of ports along the subcontinent's western seaboard. India's exports of manufactured products also rose from US\$374.32 billion in 2024 to US\$398.89 billion in 2025²¹ – a 6.6% increase.

These developments have implications for route design: more westbound services from India to Europe and the growing importance of Arabian Sea gateways.

This trend is also creating greater demand for inland multimodal transport systems capable of connecting manufacturing clusters efficiently with maritime gateways.



**US\$374B –
US\$398B**

Manufactured goods exports 2024 to 2025
(6.6% increase)

¹⁶ <https://vietnamnet.vn/en/vn-textile-exports-to-hit-usd-46-billion-in-2025-securing-top-3-global-position-2476296.html>

¹⁷ <https://www.nso.gov.vn/en/data-and-statistics/2026/01/socio-economic-situation-in-the-fourth-quarter-and-2025>

¹⁸ https://www.oecd.org/en/publications/economic-outlook-for-southeast-asia-china-and-india/volume-2024/issue-1_3bbe7dfe-en/full-report/component-5.html

¹⁹ <https://www.jll.com/en-sea/guides/southeast-asia-and-india-rising-manufacturing-powerhouses>

²⁰ <https://www.jll.com/en-sea/guides/southeast-asia-and-india-rising-manufacturing-powerhouses>

²¹ <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2201284&lang=2®=48&utm>

CHINA-AFRICA

The redistribution of global manufacturing is also redefining China's role. It is deepening its economic ties across the African continent: Chinese exports to Africa in 2025 were valued at approximately US\$225 billion²², with imports of US\$123 billion from Africa also recorded during the same period.

China further strengthened this close commercial relationship this year with the expansion of tariff-free market access to imports from 53 African nations²³. Combined with growing industrialisation across the continent, greater economic alignment with Africa is strengthening trade flows through the Indian Ocean, the Red Sea and along Africa's eastern and western seabords.



US\$225B

Chinese exports to Africa in 2025



US\$123B

Chinese imports from Africa in 2025

MEXICO

Mexico's status is also rising as global businesses seek to locate operations in greater proximity to North American consumer markets. Its established industrial base across automotive, aerospace, electronics and other advanced manufacturing sectors, combined with deep integration into US supply chains, positions the country to benefit from continued nearshoring.

This shift has direct implications for maritime and multimodal trade. As manufacturing moves closer

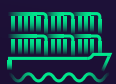


to end markets, demand is growing for integrated port, rail and road networks capable of connecting production clusters efficiently with the US and wider global markets. Mexico is also illustrative of a broader trend: supply chains are not simply diversifying geographically; they are also becoming more regional.

NORTH AFRICA

A similar dynamic is apparent in North Africa, where countries including Morocco are strengthening their role as manufacturing platforms. Growth in automotive, aerospace, textiles and other export-oriented industries is being supported by geographic proximity to Europe, expanding industrial zones and improving port connectivity.

It is creating stronger links between African production centres and European supply chains, reinforcing demand for shortsea shipping, feeder



services and multimodal connections across the Mediterranean. North Africa's rise in prominence further demonstrates that manufacturing diversification is taking place near major consumer markets and is creating new regional trade ecosystems alongside traditional long-haul routes.

²² https://mobile.chinadaily.com.cn/html5/2026-04/20/content_009_69e52d1fed50be540e72ebf7.htm

²³ https://mobile.chinadaily.com.cn/html5/2026-04/20/content_009_69e52d1fed50be540e72ebf7.htm



CONNECTING NEW MANUFACTURING HUBS TO GLOBAL MARKETS

The emergence of distributed manufacturing hubs also highlights an important development in the role of ports. Previously, they functioned mainly as transfer points between land and sea transport. Increasingly, they form part of integrated logistics hubs, connecting production centres with global markets through inland terminals, industrial zones and regional distribution networks.

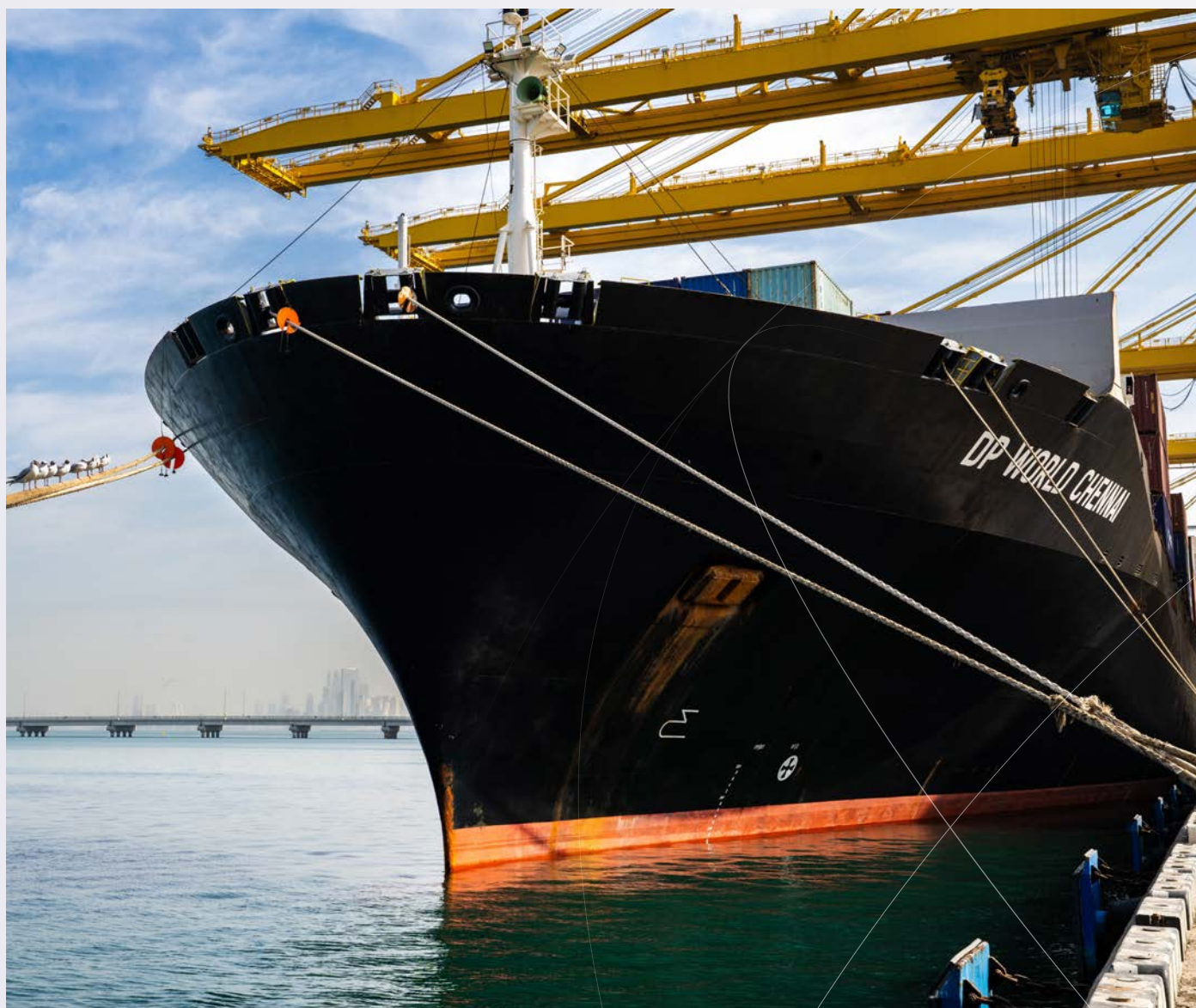
As production expands beyond traditional coastal manufacturing clusters, regional feeder services, inland waterways and river transport also play an elevated role, providing critical links between inland industries, secondary ports and international shipping services.

THE INFRASTRUCTURE GAP

The challenge facing many markets with fast-growing manufacturing footprints is that they have weak inland infrastructure and uneven feeder connectivity.

Solving these shortfalls will require significant investment. In response, logistics providers are developing integrated models that connect ports with free zones, inland terminals, rail, road, feeder services and inland waterways. This approach allows cargo to move efficiently across multiple transport modes while providing businesses with the flexibility to respond to changing trade flows and shifting production locations.

As manufacturing continues to diversify and regionalise, competitive advantage will depend on the ability to connect dispersed production centres to global markets through resilient, multimodal ecosystems.



CHAPTER 4

THE FORCES RESHAPING MARITIME TRADE

Maritime trade has entered an era in which disruption is no longer episodic. Geopolitical conflict, sanctions, climate volatility and rapid technological change are creating new operational risks and forcing businesses to rethink how resilience is built into global supply chains.



The challenge is not to predict the next disruption, rather it is to build networks capable of continuing to operate when circumstances change. Increasingly, that means moving beyond individual routes and assets and towards connected ecosystems with multiple gateways, transport modes, digital intelligence and the human expertise required to act quickly.

CONFLICTS EXPOSE DEPENDENCE ON KEY ROUTES

Conflict can reshape global shipping patterns almost overnight. Red Sea instability demonstrated the scale of this exposure: maritime traffic through the Suez Canal fell to around half its previous-year level in 2024, while ship capacity arriving around the Cape of Good Hope increased by 89% as vessels were rerouted. Longer journeys increased transit times, costs and emissions, while reducing schedule reliability.



Similarly, the US-Iran conflict saw the number of ships crossing through the Strait of Hormuz fall by **MORE THAN 90%.**²⁴

Sanctions are creating a parallel shift. Restrictions on Russian energy and maritime activity have redirected cargo towards Asian markets, increased voyage distances and contributed to a greater use of older, less transparent tanker capacity. The result is not simply a change in geography, but greater complexity around compliance, insurance, ownership and routing decisions.

These challenges are no longer episodic shocks, according to the Consultative Shipping Group (CSG), which represents Greece, Singapore, Denmark, Japan, Canada, the UK, the Netherlands and South Korea. Instead, geopolitical conflicts and the impact of sanctions point to a 'structural shift in the operating environment of global trade'.

In this environment, the most resilient route is not necessarily the shortest. It is the route that remains lawful, insurable, commercially viable and operationally predictable under stress. Regional feeder, coastal and short-sea networks therefore become more valuable, allowing cargo to be redistributed through alternative gateways when individual corridors are constrained.

CLIMATE INSTABILITY: AN OPERATIONAL CHALLENGE

Climate change is moving from an environmental consideration to an operational challenge. Drought,

extreme weather and changing water levels affect critical maritime infrastructure and reducing the reliability of established trade routes.

The Panama Canal illustrates the risk. Reduced rainfall and lower water levels reduced daily vessel transits from 32 to 24, while draft restrictions limited the size and loading of vessels that can pass through.



In Europe, record low water levels on the Rhine in 2026 forced some vessels to operate at as little as **20% OF NORMAL CARGO CAPACITY.**

This increasing transport costs and disrupting industrial supply chains linked to Rotterdam and Antwerp-Bruges.

These events expose a weakness in supply chains designed primarily around scale and efficiency. Larger vessels can deliver significant efficiencies under stable conditions, but these gains are eroded when critical gateways are constrained.

Climate resilience increasingly depends on the wider network around the vessel: alternative ports, feeder services, inland waterways, rail, road and regional logistics hubs capable of redirecting cargo when traditional routes become less reliable.

OPTIONALITY AS A STRATEGIC ADVANTAGE

The strategic response to geopolitical and climate disruption is similar: build more choices into the system. Following this approach, ports are evolving from transfer points into resilience hubs. Rather than simply connecting smaller ports and deep-sea networks, feeder services are strategic connectors. Inland waterways and rail and road options provide alternative pathways when maritime routes are constrained. And regional hubs can absorb and redistribute cargo when long-haul networks face disruption.

Optionality does not mean inefficient duplication. Multiple gateways and transport choices must be designed around the points where disruption would have the greatest impact, with those alternatives supported by customs procedures, transport schedules and digital systems. An additional route has little value if cargo cannot move through it efficiently when it is needed.

²⁴ <https://www.royalnavy.mod.uk/news/2026/may/01/20260501-hormuz-stand-off-has-reduced-traffic-to-a-trickle-says-royal-navy-team>

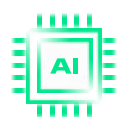
EMBEDDING AI INTO THE ECOSYSTEM

Technology is increasingly determining how effectively these complex networks are managed. DP World's 2026 Global Trade Observatory found that 95% of supply chain and logistics executives use AI in part of their operations, with its greatest value derived from improved efficiency, visibility and decision-making.

In maritime logistics, AI can improve demand forecasting, optimise vessel deployment, predict maintenance requirements and identify disruption earlier. It can also simulate alternative routing scenarios and help organisations to understand the consequences of a port closure, a capacity constraint or a sudden shift in demand before cargo is affected.

The next step is to use digital intelligence across the wider ecosystem. AI can help to synchronise berth planning, towage, pilotage, feeder services, barge movements, inland transport and customs processes, shifting optimisation from individual assets towards entire ecosystems.

Technology alone does not create resilience. Digital platforms can identify disruption and recommend alternatives; they cannot move cargo. Competitive advantage will come from combining the efficiency of AI with the judgement and expertise of people, supported by physical networks that execute those decisions.



95%

of supply chain and logistics executives use AI in part of their operations.

FROM ALTERNATIVE ROUTES TO CONNECTED TRADE CORRIDORS

Combined, these forces point towards a different model for maritime trade. Resilience cannot be created simply by adding alternative lines in a map. An efficient port cannot compensate for an unreliable inland connection, fragmented customs processes or a lack of capacity elsewhere in the network. Alternative corridors work only when ports, shipping, road, rail, inland waterways, customs systems and digital platforms operate as a connected ecosystem.

That is the role of Connected Trade Corridors: integrated networks combining deep-sea shipping, feeder and coastal services, ports, marine operations, inland logistics, multimodal transport, digital intelligence, AI and human expertise. Their value lies in creating the ability to change the physical path of cargo without fragmenting the customer journey.

TRADE NETWORKS DESIGNED AROUND OPTIONALITY

The future of maritime trade will be shaped less by the ability to eliminate disruption than by the ability to adapt to it. Geopolitical shocks will continue to redirect cargo. Climate change will place new pressure on critical infrastructure. Sanctions and regulation will alter where and how trade can move. AI will accelerate decision-making. The organisations best positioned for this environment will be those that integrate these capabilities into resilient networks designed around optionality.



CHAPTER 5

CONCLUSION: SHAPING A RESILIENT FUTURE

For decades, supply chains were designed around stable trade relationships, predictable shipping routes and logistics networks optimised for cost and speed. Efficiency remains critical, but in an uncertain world, resilience is an equally important source of competitive advantage.



Five years ago, customers asked us how quickly we could move cargo. Today, they ask how quickly we can support them to recover from disruption.



GANESH RAJ

Global Chief Operating Officer, Marine Services, DP World

This shift is reflected in sentiment across the supply chain and logistics industry. DP World's 2026 Global Trade Observatory Annual Outlook Report²⁵ found that 94% of more than 3,500 surveyed supply chain and logistics executives expect trade growth in 2026 to match or exceed 2025 levels, despite anticipating continued geopolitical and policy uncertainty.

Global trade is therefore not retreating. It is becoming more diversified, regionalised and, at the same time, increasingly interconnected. As these changes accelerate, supply chains must be designed to accommodate greater complexity while providing the flexibility to respond as conditions evolve. Whether responding to climate-related constraints, supporting dispersed manufacturing or adapting to geopolitical instability, integration is fundamental to resilience.

This is where Connected Trade Corridors play a vital role. Resilience will depend less on the performance of a shipping lane, and more on the strength of the connections between maritime transport, ports, marine services, inland logistics, multimodal networks, digital intelligence and human expertise.

The opportunity is therefore not simply to make existing supply chains more efficient. It is to build connected, adaptive ecosystems capable of supporting new patterns of commerce while keeping goods moving when individual routes come under pressure.

Around
\$14 TRILLION
worth of containerised goods
depend on maritime transport.

The organisations that help move that trade in the decades ahead will be those that combine efficiency with resilience, technology with human judgement, and individual assets with integrated networks.

The first generation of global trade connected markets. The next generation will connect smarter ecosystems.



²⁵ <https://dpw-p-001.sitecorecontenthub.cloud/api/public/content/2299648c2ebb434f9fc6309fb06f434d?v=96adebf7>



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