LogiSYM

The Magazine for Supply Chain Executives

NOVEMBER 2025

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Global Trade & Tariffs: International & Local Trade, Nearshoring, Re-shoring, and Corporate Compliance

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EDITORIAL MESSAGE

From the Editor

Welcome to the November edition of LogiSYM Magazine. I recently had a chance to lead a discussion on the relationship of anti-fragility and brand protection at the TAPA APAC Conference in Singapore. Antifragile supply chains are supposed to get stronger from stress. But I was watching the bats squeaking and dive-bombing the pool last night, and it got me thinking about the precision of execution they achieve without vision in terms of eyesight, their innate talent for ultrasonic biosonar navigation: through bursts of high-frequency sound they are guided, bats map chaos in real time, adapting mid-flight to sudden changes in environmental conditions. Supply chain leaders might envy this talent: the trick is not having perfect vision; it is learning to thrive on uncertainty, "echo-locate," recover from collisions, and call it process improvement.

Or call it anti-fragility—which does not mean never hitting a wall; it means bouncing back, turning the disaster into your next competitive edge. Welcome to evolution by ultrasonic: if you are not getting stronger, you might be just flapping in the dark.

The theme for this month's LogiSYM Magazine is one that has certainly kept the logistics and supply chain world buzzing for most of the year: Global Trade and Tariffs—Navigating Trends, Shifts, and Compliance Challenges. Without "stealing the thunder" of our feature article contributors, we have thought-provoking insights by Peter Tirschwell of S&P Global, our regular expert commentator, Wolfgang Lehmacher, Marco Tieman of HSC Alliance, Kim Winter from Logistics Executive in Dubai, LSCMS Shipper's Council Chairman Kendrick Ng, and our ever-Green Corridor writer, Tim Foote.

This has been an exciting year for LogiSYM Symposium and Platinum events, with LogiSYM Platinum Jakarta in 2 weeks' time being the final for the year. Planning for a broader scope of events across Southeast Asia in 2026 is already well underway with a focus on increasing touchpoints for logistics and supply chain professionals from around the world, here in Asia.

Happy reading!

Brett Marshall
Editor-In-Chief
LogiSYM Magazine



LSCMS PRESIDENT'S MESSAGE

Christmas is on the Anvil.

As we approach the close of another dynamic year in logistics and supply chain management, it's clear that 2025 continues to test our ability to adapt, innovate, and collaborate. From shifting trade routes to evolving technologies and geopolitical uncertainties, the landscape remains as challenging as it is full of opportunity.

At LogiSYM, we've always believed that progress comes not just from reacting to change but from engaging with it. Whether it's through our symposiums, regional chapters, or this very publication, our mission remains to connect professionals, ideas, and best practices that move the industry forward.

This month's issue reflects that spirit of continuous learning and collaboration, bringing insights from across ASEAN and beyond. As always, I encourage you to engage, question, and share—because it's in these exchanges that our community grows stronger and more resilient.
Let's continue shaping the future of supply chains together—smarter, greener, and more connected than ever.

Raymon Krishnan, FALA, FCILT, CLP
President The Logistics & Supply Chain Management Society



LogiSYM

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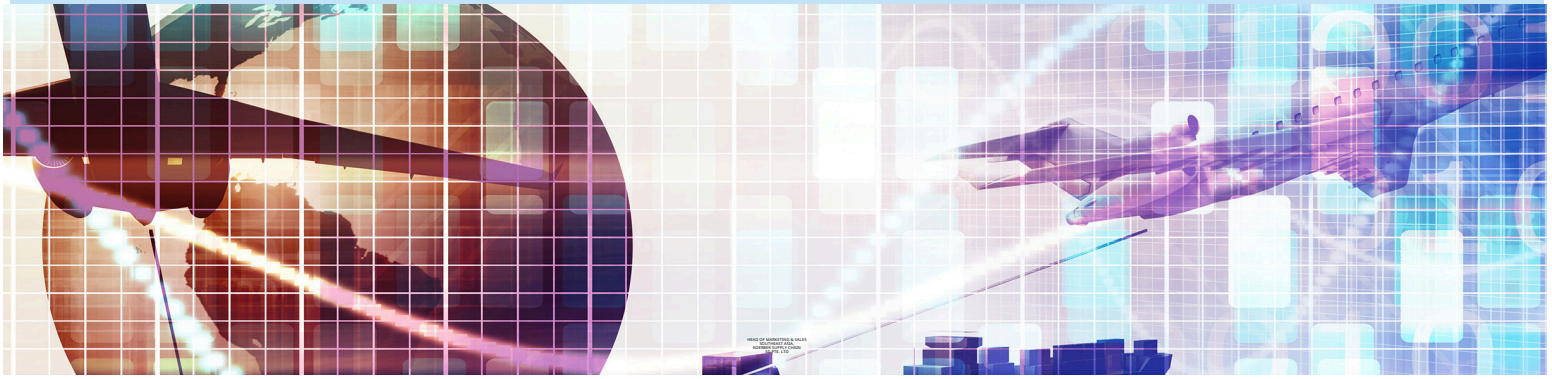
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Mapping New Trade Frontiers: How Tariffs, Nearshoring, and Compliance Are Redrawing Global Relationships.

By **Peter Tirschwell**, Vice President, **Journal of Commerce** by S&P Global

Tariffs have been a moving target all year long for companies importing into the US, creating levels of uncertainty that inhibit decision making while raising long term questions about strategy in the face of a world order where a longtime global consensus on the value of trade no longer applies.

Irrespective of how the US Supreme Court rules on the Trump administration's use of the 1977 International Emergency Economic Powers Act to justify significant increases in tariffs - oral arguments were held on 5 November and a decision could come quickly - the landscape for companies has irrevocably shifted. This has played out in the context of the US-China bilateral relationship. The year has seen growing evidence of decoupling in containerized trade, as companies importing into the US accelerated re-shoring while China in turn re-oriented its exports to destinations separate from North America. Containers handle roughly 45% of global trade by value, according to UNCTAD. And this year saw a visible acceleration in re-shoring of US sourcing away from China, as visible through container trade flows.

China's market share in US containerized imports from 2025 year to date through September dropped 4.1 percentage points to a multi-year low of 36.2%, the biggest drop during that 9-month stretch that has been recorded over the past decade, according to S&P Global Market Intelligence. During that period Vietnam, the big winner, saw its share of US containerized imports increase from 9.8% to 11.7%, while India, Thailand, Indonesia, Malaysia, Cambodia, and Bangladesh also saw market share gains, albeit smaller.

At the same time, China reoriented its exports away from the US, significantly ramping up its global market share on exports over the past two years as well as its export growth to all regions of the world apart from North America. For example, China's global market share of exports shot up from 33% to 37% between August 2023 and August 2025, according to data shared by AP Moller-Maersk as part of its 3Q earnings release on Nov. 6.

During this two-year period, cumulative annual growth in volumes from China grew 12% to Far East Asia, 10% to Europe, 18% to West/Central Africa, 19% to Latin America, and 8% to Oceania but only 5% to North America.

"China's export growth into all regions of the world, except for North America, has not only been resilient, it has also gathered pace," Maersk CEO

China exports remain the main growth engine of container market volume growth and continue their upward journey

China global export share[1]



China exports by import region (million FFE's)

Region	YTD Aug '23	YTD Aug '25	CAGR	YTD Aug '25 % of total
Far East Asia	5.3	6.6	12%	29%
Europe	4.3	5.2	10%	23%
North America	4.2	4.6	5%	20%
West-Central Africa	1.8	2.6	18%	11%
Latin America	1.3	1.8	19%	8%
Africa	0.9	1.2	15%	5%
Oceania	0.6	0.7	8%	3%
Total World	**18.4**	**22.8**	**11%**	**100%**

China exports (ex North America) still going strong with global share continuing to increase

Source: https://investor.maersk.com/financials/financial-reports

Vincent Clerc told investors on Nov. 6. “China's share of global export has increased significantly and never as fast as it has over the past two years.” “The fabric of global trade is changing,” Clerc had told investors back in August.

“If you just look at the numbers, what we’ve seen in the last two and a half years is an acceleration of globalization on the back of huge commercial success from Chinese companies that are taking market share on the global stage.”

This took place in the context of a buoyant global economy that defied the shock of US tariffs, given that no country followed the US down the road of trade conflict. Estimates for global GDP growth in 2025 were raised in October from 2.6% to 2.7%, according to S&P Global Market Intelligence. “Global economic conditions have been resilient to trade-related uncertainties,” the firm said in its latest Global Executive Summary published on Oct. 16.

“We continue to forecast a near-term moderation in growth momentum in most major economies and regions, primarily due to a hangover from prior tariff front-loading,” the forecast said. “This is not expected to turn into a slump in 2026 thanks to a few tailwinds for growth.

These include further falls in crude oil prices, feeding into lower inflation rates and more accommodative monetary policies.” The upheaval in trade from US tariffs is clearly visible in container shipping dynamics that point to a diversification in trade requiring full fleet utilization despite growing signs of overcapacity. Spot freight rates on a global basis are down 50% since the beginning of the year, according to the Drewry World Container Shipping Index. Yet idling and scrapping remain minimal, and charter rates and second-hand ship prices remain strong. The idle fleet was “remarkably low,” Alphaliner said on 3 November, currently pegged at 0.9% of total global capacity.

“Despite market pressure, the idle fleet remains minimal, signaling robust vessel utilization,” Alphaliner said in October. This reflects a fracturing of the longtime dominance of traditional east-west trade lanes into multiple smaller and faster-growing trade routes, including those to and from Africa, as reflected in the data shared by Maersk.

Ships as large as 24,000 TEUs are now calling at ports in West Africa. But in many cases these cross-trades require smaller ships that have not been turned out by shipyards at the same pace as mega-vessels over the past decade, hence the robust demand as reflected in charter rates and lack of idling and scrapping in 2025. At the same time, although North America was the slowest growing, region for China trade in the Maersk data, there is a view among some industry leaders interviewed in October that the trans-Pacific trade lane may not remain quiet for too long. The lack of congestion seen at major US import gateways such as Los Angeles-Long Beach in 2025 is seen by some industry leaders as evidence of fluidity at warehouses — where the 2022 backups originated.

In other words, inventory, instead of being stockpiled this year due to frontloading of imports to avoid tariffs, is instead flowing down the supply chain through to final sale. According to investment bank Jefferies, that means when it comes to US imports, “recovery is likely in 2026.”

US imports from Asia dropped almost 12% in September year over year after being on a record pace earlier in the year, according to PIERS, a sister company of the Journal of Commerce within S&P Global Market Intelligence. Imports are forecast to continue to decline for the remainder of



this year and into early next year. Some, however, believe the frontloading story of 2025 was overplayed—the message being that destocking is actually the major theme this year, which will result in a more robust 2026.

In other words, while importers sought earlier in the year to get goods into the country ahead of potentially steeper tariffs imposed later in the year, in reality most goods actually brought into the US flowed down the supply chain through to final sale.

"Another 'muted' peak season in 2026 seems unlikely, given inventory levels," Jefferies wrote in a research note Tuesday. "Thus, we can see a healthier market on the trans-Pacific [next year]." "In the first quarter of 2026, there will be a mini revival similar to COVID in terms of volumes," said a senior US-based carrier executive. "Warehouses are depleted, and you can see some real movement of volume, and space will become tight." Others have noticed that inventories in the US are not bloated, nor is the country in recession, thus supporting the potential for an early-year bounce back in trans-Pacific volumes.

Inventory-to-sales ratios for retailers—which have hovered between 1.28 and 1.32 this year, according to the US Bureau of Economic Analysis—suggest that businesses "are holding leaner inventories than expected amid the frontloading narrative," Maersk said in an Oct. 1 market update.

Inventory-to-sales ratios compare the value of a company's inventory to net sales and provide a measure of how quickly inventory moves off the shelf. That is leading to optimism in some segments of the supply chain, such as warehouse space. "Demand has clearly turned a corner. The market is in an inflection point," Christopher Caton, senior vice president and global head of research at Prologis, Inc. told investors on Oct. 15, as reported by CapIQ Pro.





Peter Tirschwell

Vice President, Journal of Commerce by S&P Global

Peter is responsible for all content appearing on JOC.com, The Journal of Commerce magazine and JOC Events, as well as Safety at Sea and Ports & Harbors magazines. Previously, he was executive vice president and chief content officer at JOC Group, as well as a reporter, West Coast Bureau chief, editor in chief and publisher of The Journal of Commerce.

Peter is the founder and chairman of the annual TPM conference in Long Beach, California, one of the world's largest shipping events, and led the development of the JOC Port Productivity data, the first global database of container port and marine terminal performance. He is a columnist for The Journal of Commerce and JOC.com covering a range of international logistics topics. He is a sought after speaker for industry events and has been quoted in The Wall Street Journal, Financial Times and The New York Times.

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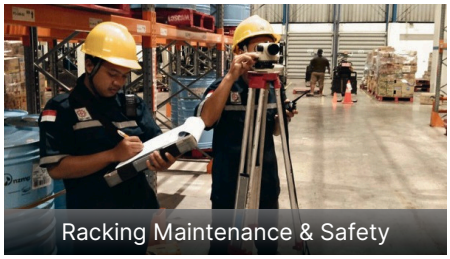
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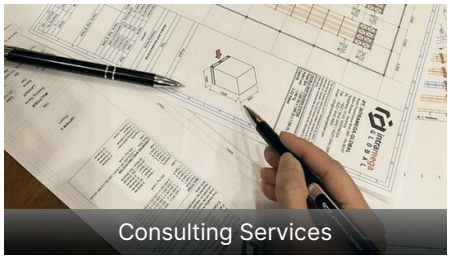

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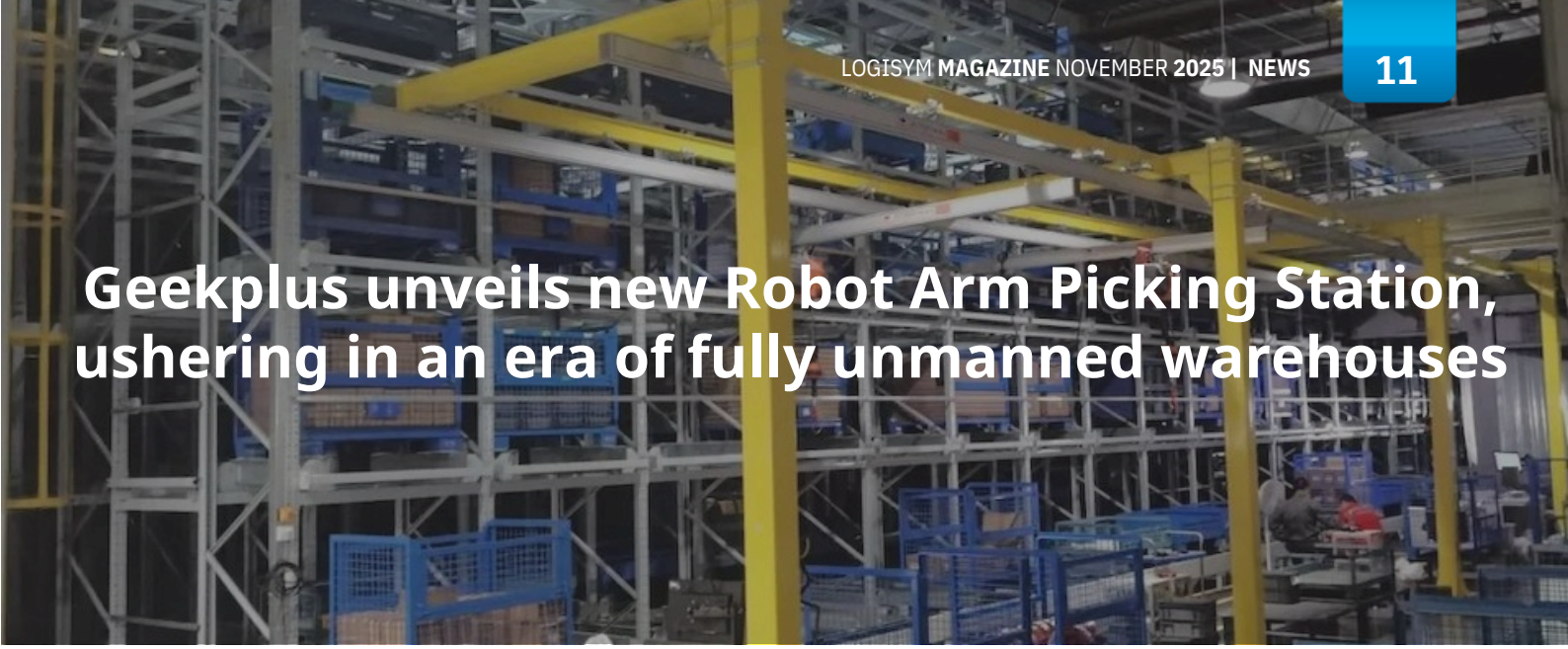
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Geekplus unveils new Robot Arm Picking Station, ushering in an era of fully unmanned warehouses

SHANGHAI, October 28, 2025 – Geekplus (Stock Code: 2590.HK), the global leader in warehouse robotics, today unveiled its new Robot Arm Picking Station, marking the industry's first end-to-end unmanned picking solution and a major leap from "partial automation" to "full-process intelligence." The breakthrough sets a new benchmark for warehouse automation and redefines what's possible in unmanned logistics.

"This new solution marks a key milestone in our journey toward general-purpose warehouse robotics," said Yong Zheng, founder and CEO of Geekplus. "With the picking process now fully automated, our next focus is on the packing stage, where robotic arm packing technologies are under active development.

Supported by our deep technical expertise and innovation capabilities, we're confident that full-process unmanned warehouses will soon become a reality."

At the core of the new workstation is Geek+ Brain, which overcomes one of the toughest challenges in warehouse automation: enabling robotic arms to precisely pick and adapt to large, diverse SKU inventories across multiple product types and industries.

THE ROBOT ARM PICKING STATION DELIVERS THREE CORE ADVANTAGES:

1. Plug-and-Play Agility: Trained on massive real-world data, Geek+ Brain's general model enables intelligent recognition and grasping of tens of thousands of SKUs, including irregular and soft-packaged goods, without retraining. Its modular design supports 48-hour rapid deployment and flexible expansion to adapt to seasonal or packaging changes.

2. Ultra Efficiency: Lightweight model optimization achieves millisecond-level inference speed and smooth coordination across workflows, delivering multiple times the picking efficiency of manual labor and supporting 24/7 continuous operation. Advanced features such as Double Pick verification and scanning modules ensure near-zero errors and consistent, predictable performance.

3. Data Security by Design: All model processing and data o





Marie Peterson, VP International Marketing & Communications





operations occur on-premises, eliminating cloud transmission risks and ensuring compliance with the strictest enterprise data privacy standards.

The new workstation completes the final link in Geekplus' full-process unmanned picking chain.

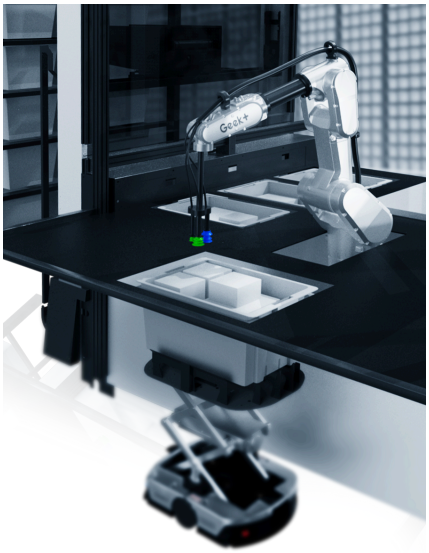
Seamlessly integrated with the company's AMR portfolio, it can be easily embedded into existing warehouse workflows. Supporting both single-order picking (for real-time responsiveness) and batch picking (for optimized throughput), the solution addresses complex business needs across e-commerce, retail, pharmaceuticals, and 3PL operations.

Geekplus' leadership in full-process unmanned warehouse automation is powered by its unified technology architecture. Through a cohesive software ecosystem and a complete AMR product portfolio, Geekplus enables multisolution collaboration across warehouse processes, significantly reducing integration costs and complexity.

Geek+

About GEEKPLUS

About Geekplus Geekplus is a global leader in mobile robotics technologies. We develop innovative robotics solutions for order fulfilment. More than 850 global industry leaders use our solutions to realize flexible, reliable, and highly efficient automation for warehouses and supply chain management.





The Mirage and Reality of Strategic Supply Control: Lessons from the Nationalism Era

By **Wolfgang Lehmacher**, Global Supply Chain Advisor & Former Director, **World Economic Forum**

Alex Capri's interviews with Channel NewsAsia (CNA) serve as a timely entry point into the debate over the control of strategic supply chains. The most recent interview is part of Capri's ongoing commentary on the global economic order.

Capri, a thought leader on international trade and techno-nationalism, highlights how the epicenter of US-China competition has shifted from tariffs and traditional trade disputes to the command of foundational technologies and resources. His analysis, echoed in his recent book and multiple interviews, frames the current era as one marked by the weaponization of supply chains and the rise of resource nationalism.

The contest for control over strategic supply chains, not just the goods themselves, is now the beating heart of international competition.

Capri notes that the world's attention has shifted from tariffs and trade deficits to 12 power-multiplier technologies, including semiconductors, rare earths, quantum sciences, and artificial intelligence (AI), which underpin modern economies and national security. But is the quest for control over these supply chains a practical strategy, or merely an illusory pursuit in an interdependent world? And what are the consequences for national well-being and the resilience of the global system?

THE ILLUSION AND LIMITS OF CONTROL

The drive to command strategic supply chains is not new, but its intensity and scope have reached the highest levels. Capri's notion of techno-nationalism, where technological prowess is inseparable from national security and economic strength, captures the zeitgeist of our era. The US dominates in semiconductors, China in rare earths processing; both nations are racing to secure their spheres of influence, reshaping the global economic order. Yet, the ambition of full control is, in many respects, an illusion.

Modern supply chains are highly complex, spanning continents, requiring specialized knowledge, capital-intensive infrastructure, and a web of suppliers and logistics partners. Many value chains are so globally distributed that even the most powerful nations cannot simply reshore or nearshore production without incurring immense





costs , time, and risk. Taiwan's dominance in advanced chip manufacturing gives it leverage, but also exposes the world to acute vulnerabilities; no single nation can replicate the ecosystem overnight.

WHAT ACCELERATES—AND WHAT HINDERS—CONTROL

Several forces accelerate the push for strategic control. Geopolitical tensions, as evident in the US-China rivalry, prompt nations to decouple, reshore, and diversify their supply networks. Resource nationalism, where states assert control over critical minerals and technologies, is on the rise, often justified by the need for economic security or political leverage.

The COVID-19 pandemic and subsequent supply shocks exposed the complexity of globalized supply chains, prompting a reevaluation of cost-reduction-oriented just-in-time models in favor of more costly but more resilient approaches. Technology is a double eged sword. Digitalization, AI, and advanced analytics enable greater visibility and control, allowing companies and governments to monitor and respond to disruptions more rapidly. Yet, the same interconnectedness increases vulnerability to cyberattacks and systemic risks, as digital supply chains can be disrupted by actors anywhere in the world.

What hinders control is the complexity and cost of strategic autonomy. Building redundant or parallel supply chains, particularly in sectors such as semiconductors or advanced materials, requires substantial investment, skilled talent, and years of development.

Nationalistic policies can trigger retaliation, reduce economies of scale, and fragment markets, leading to higher costs and potentially inferior products and inefficiencies for all parties. Resource nationalism can backfire: state control often leads to instability, underinvestment, and supply disruptions, as seen in the mining sectors of resource-rich but politically volatile countries.

IMPACT ON SUPPLY CHAINS: FRAGMENTATION AND FRAGILITY

The impact on supply chain networks is profound. The era of seamless globalization has given way to fragmentation, with companies and countries building parallel networks aligned with geopolitical blocs. Supply chains are becoming increasingly regionalized, a trend that naturally started 20 years ago, with a focus on resilience, redundancy, and agility, rather than solely on cost efficiency.

This shift is not without pain: costs rise, innovation may slow, and the risk of shortages increases, particularly for critical inputs concentrated in a limited number of countries. Supply chain managers face a new equilibrium: balancing efficiency, resilience, and agility in a world where shocks are the norm. The adoption of digital tools, scenario planning, and end-to-end visibility is accelerating, but these investments take time to yield results and require new skills and mindsets.

IS CONTROL DESIRABLE?

The National Well-Being Dilemma is the pursuit of strategic supply control even desirable from a national well-being perspective? The answer is nuanced. Reducing dependence on hostile or unreliable partners for critical technologies and resources is prudent, even essential, for national security and economic stability.

The pandemic and recent geopolitical crises have shownthat overreliance on global supply lines can threaten not only prosperity but also the basic functioning of society. However, excessive focus on self-sufficiency can

undermine the goals it seeks to achieve. Autarky breeds inefficiency, raises costs for consumers and businesses, and can stifle innovation by cutting off access to global talent, ideas, and markets.

Moreover, the attempt to "control" supply chains can escalate tensions, provoke retaliation, and increase the risk of conflict, as nations jostle for access to scarce resources and strategic technologies.

RISKS: FROM ECONOMIC COSTS TO GEOPOLITICAL INSTABILITY

The risks of pursuing strategic control are manifold. Economically, the costs of redundancy, reshoring, and protectionism can be immense, reducing competitiveness and economic growth. Politically, resource nationalism and techno-nationalism can exacerbate tensions, disrupt markets, and trigger cycles of retaliation that harm all parties involved. The fragmentation of supply chains also increases the risk of systemic failures.

If one bloc suffers a shock, its insulated networks may lack the flexibility to adapt, amplifying the impact. Perhaps most dangerously, the weaponization of supply chains can turn economic competition into outright conflict. As Capri and others warn, the intertwining of national security and economic policy raises the stakes, making Supply chain disruptions are a potential trigger for escalation, rather than a buffer against it.

CONCLUSION: PRAGMATISM OVER ILLUSION

The quest for strategic supply control is both a response to real vulnerabilities and an illusion born of the desire for certainty in an uncertain world. As the broader research shows, complete control is neither feasible nor desirable. The wiser path lies in building resilient, agile, and diversified supply networks, balancing national interests with the benefits of global interdependence. Managing dependencies is a critical but underdeveloped skill in business and government. Ultimately, the well-being of nations will depend not on fortress economies but on the ability to adapt, collaborate, and innovate in a world where supply chains are both the battleground and the bridge of our shared future.

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Wolfgang Lehmacher

Global Supply Chain Advisor & Former Director, World Economic Forum

Wolfgang Lehmacher is a renowned expert in global supply chain and logistics. The former director at the World Economic Forum and CEO Emeritus of GeoPost Intercontinental serves as an advisory board member of The Logistics and Supply Chain Management Society in Singapore, an ambassador for F&L in Brussels, and an advisor to RISE. He contributes to the knowledge base of Supply Chain Innovation.



RealMan Unveils RealBOT Embodied Open Platform at IROS 2025

At the recently concluded IEEE/RSJ International Conference on Intelligent Robots and Systems (IROS 2025), RealMan Robotics made a major breakthrough with the debut of its RealBOT Embodied Open Platform.

The company successfully conducted a cross-regional teleoperation demonstration, linking Beijing and Hangzhou, 1,200 km apart, to showcase the real-time collaboration capabilities of embodied intelligent systems.

Through a dual-city setup connecting the Beijing Humanoid Robotics Data Training Center and the IROS exhibition booth in Hangzhou, a RealMan trainer in Beijing remotely controlled humanoid robots at the booth to perform complex interactive tasks such as handing over a towel and passing fruit.

Accelerating Embodied Intelligence Innovation RealBOT is a comprehensive open platform designed to accelerate embodied AI innovation. It integrates advanced motion control, multi-dimensional perception, and precision manipulation, empowering researchers and developers to experiment, prototype, and advance embodied AI applications.

Built for high-quality data collection, RealBOT leverages over one million multimodal data samples collected across ten real-world application scenarios from RealMan's Data Training Center.

This enables more robust model training and faster deployment across industries.

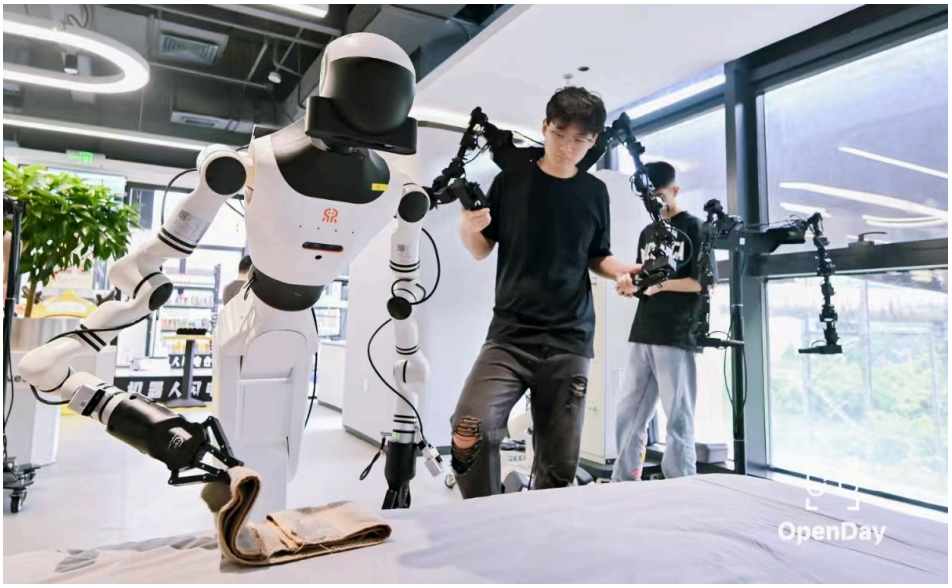
KEY TECHNICAL ADVANTAGES

Full Stack In House Development: Proprietary actuator and control technologies ensure optimized performance and reliability.

Flexible Compute Support: Compatible with both NVIDIA Jetson Orin and Digua RDK S100 platforms.

Multisensor Fusion Perception: Integrates depth and wide-angle cameras, LiDAR, IMU, and microphone arrays.

Compact Design for Narrow Spaces: Excellent mobility and precision operation in confined environments. High-Degree Dexterity: 21 active DOFs with support for dexterous hands and adaptive grippers.

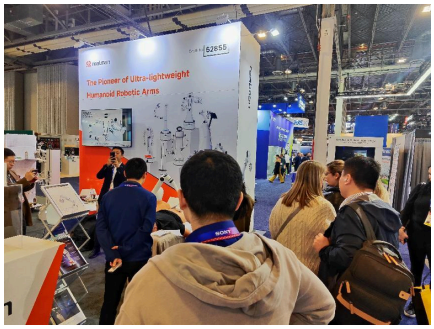






Open Ecosystem: Compatible with various mainstream vision systems and gripper models.

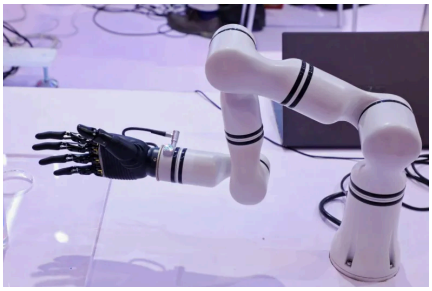
With its ultra-lightweight architecture, RealBOT lays the groundwork for scalable humanoid systems and high-quality data generation, empowering embodied AI to move from lab research into homes, factories, and service industries worldwide.



DRIVING GLOBAL COLLABORATION IN EMBODIED AI

The Beijing Humanoid Robotics Data Training Center, built by RealMan, now serves as the backbone for high-quality data generation and AI training. Featuring over 100 robots across 10 real-world environments, it enables the continuous collection of large-scale multimodal datasets that support RealBOT and global research partners, building an open, collaborative ecosystem for embodied intelligence.





realman

About REALMAN

RealMan is a national high-tech enterprise specializing in the R&D, production, and sales of ultra-lightweight humanoid robotic arms. Headquartered in Beijing, the company's factory is located in Jiangsu.

RealMan's products are now widely used across various sectors, including new retail, modern dining, commercial services, intelligent inspection, healthcare, quality control, education and research, industrial production, and aerospace.

International patents, including granted patents and granted inventions, in the US, EU, the UK, Canada, Singapore, Japan, and South Korea.
Nearly all Realman robotic products have received globally recognized safety certification — CB certification.



International Halal Trade: structure, Trends, and emerging requirements

By **Dr. Marco Tieman**, CEO **HSC Alliance**

The halal market is an estimated USD 2.5 trillion market, consisting of halal food (USD 1.5 trillion), followed by modest fashion (USD 327 billion), media & creation (USD 260 billion), travel (USD 217 billion), pharma (USD 107 billion), and cosmetics (USD 87 billion). The halal market is growing between 5-7% year-on-year, and Muslim-friendly travel is even double-digit at 12.1% year-on-year.

The latest State of the Global Islamic Economy Report 2024/25 by DinarStandard clearly shows the structure of international halal trade. The biggest importers of Muslim (majority) countries, also known as Organisation of Islamic Cooperation (OIC) countries, are Saudi Arabia (USD 43.1 billion), followed by UAE (USD 41.3 billion), Türkiye (USD 33.9 billion), Indonesia (USD 29.6 billion), and Malaysia (USD 26.8 billion).

However, a year-on-year decrease of 1.8% is expected as these OIC countries are increasing production capacity. On the other hand, for the largest exporters to OIC we see a very different picture, which is dominated by non-OIC countries. The 5 largest exporters to OIC are namely China (USD 32.5 billion), India (USD 28.9 billion), Brazil (USD 26.9 billion), Russia (USD 20.6 billion), and the US (20.2 billion). No OIC countries in the top 5! During my recent visit to China in October this year, it was evident that China is not only a leading supplier of raw materials but also a strong producer of a wide range of halal-certified consumer products, including modest fashion.

China is very well positioned to take an important role in halal production, as they have a strong agriculture sector and control of the entire supply chain, supported by their logistics infrastructure. China is dominating the top 10 of largest seaports by container TEU or cargo tonnage rankings (2024): Port of Shanghai (1), Port of Ningbo-Zhoushan (3), Port of Shenzhen (4), Port of Qingdau (5), Port of Tianjin (7), Port of Guangzhou (8), and Port of Hong Kong (9). For air cargo tonnage rankings (2024), Hong Kong International Airport (1), Shanghai Pudong International Airport (2), and Guangzhou Baiyun International Airport (9).

My reading is that China is just getting started in the halal industry and can be expected to further increase its export to the OIC. They will maintain their number 1 position, further increasing the gap with number 2. India, strategically located between the Middle East (the largest halal importers) and Southeast Asia (the largest halal markets)







has been a solid supplier of halal agri-food products to the OIC. India should be able to hold a leading (top 5) position in agri-food supply to the OIC, leveraging its agriculture sector, manufacturing sector, and labour market. Today Brazil is the world's largest halal meat exporter, providing top-quality poultry and beef to OIC markets and beyond. Brazil is also the largest exporter of coffee, soybeans, and orange juice, amongst others.

With strong support from the Brazilian government and organisations like the Arab-Brazilian Chamber of Commerce, Brazil is likely to further increase its role in the halal value chain by also exporting processed food & beverages as well as its famous specialty food products and snacks from Brazil. Brazil will be hosting in October 2025 its third Global Halal Brazil Business Forum with prominent speakers and stakeholders from the Muslim world, the halal industry, and the Brazilian government and industry. Brazil is further enhancing its halal ecosystem. Therefore, there are high expectations for Brazil in the coming years to further increase its halal trade volumes and possibly even increase its global halal export ranking to number 2.

The number 4 and 5 positions of Russia and the US are not only close, but might also see other countries enter in the coming years. There is a lot of pressure in the OIC to develop production capacity within OIC countries and enhance intra-OIC trade.

However, building production capacity within the OIC will require major investments in developing halal industrial clusters. This is only possible when OIC countries are able to build advanced halal ecosystems with proper clustering, complete halal supply chains (including ingredients), address sustainability, and mobilize Islamic finance. OIC countries that are candidates to enter the top 5 halal exporters to the OIC in the coming ten years are Indonesia, Türkiye, and the Kingdom of Saudi Arabia.

Halal requirements are moving away from a product approach towards a supply chain approach, similar to food safety and cold chains, which is supported by local and international (OIC/SMIIC) halal standards. Leading halal brands (from both OIC and non-OIC countries) are already addressing halal throughout their supply chain. Indonesia has already mandated this by law since October 2024 for food (for food imports from October 2026), and other advanced OIC countries in Asia and the Middle East are expected to adopt similar regulations by 2030. Serving OIC markets requires not only halal certification but also has implications for the entire supply chain. It is important to educate and prepare exporting manufacturers that halal requirements go beyond the halal certificate and apply to

the entire supply chain. Hence, a critical success factor in the halal industry for the coming years will be the supply chain, covering key areas such as control of supply (raw materials, ingredients), ability to control halal integrity from source to point of consumer purchase, and ability to cluster the halal supply chains geographically. The top 5 exporters to the OIC will need to excel in the halal supply chain.

Simplification of halal will be key, which is an important function of HSC Alliance, where we are building an international halal supply chain network, harmonising halal supply chain protocols, and facilitating a halal supply chain rating for manufacturers, their supply chain, ports, logistics service providers, and industrial zones. Simplification can also be supported through halal ecosystems and halal industrial zones, in both OIC and non-OIC countries. Malaysia has been the pioneer in developing dedicated halal industrial zones to provide a halal ecosystem, which model has been followed by other countries.

It is expected that advanced halal ecosystems, through dedicated halal industrial zones, will be further developed in both OIC (Asia, the Middle East, and Africa) as well as non-OIC countries (Asia, Africa, and South America).

In summary, the halal market is an attractive market few industries can afford to ignore. However, in order to be successful supplying to OIC countries, halal needs to be addressed effectively throughout the supply chain.

Supply chain excellence is not an option anymore but an evident market requirement.





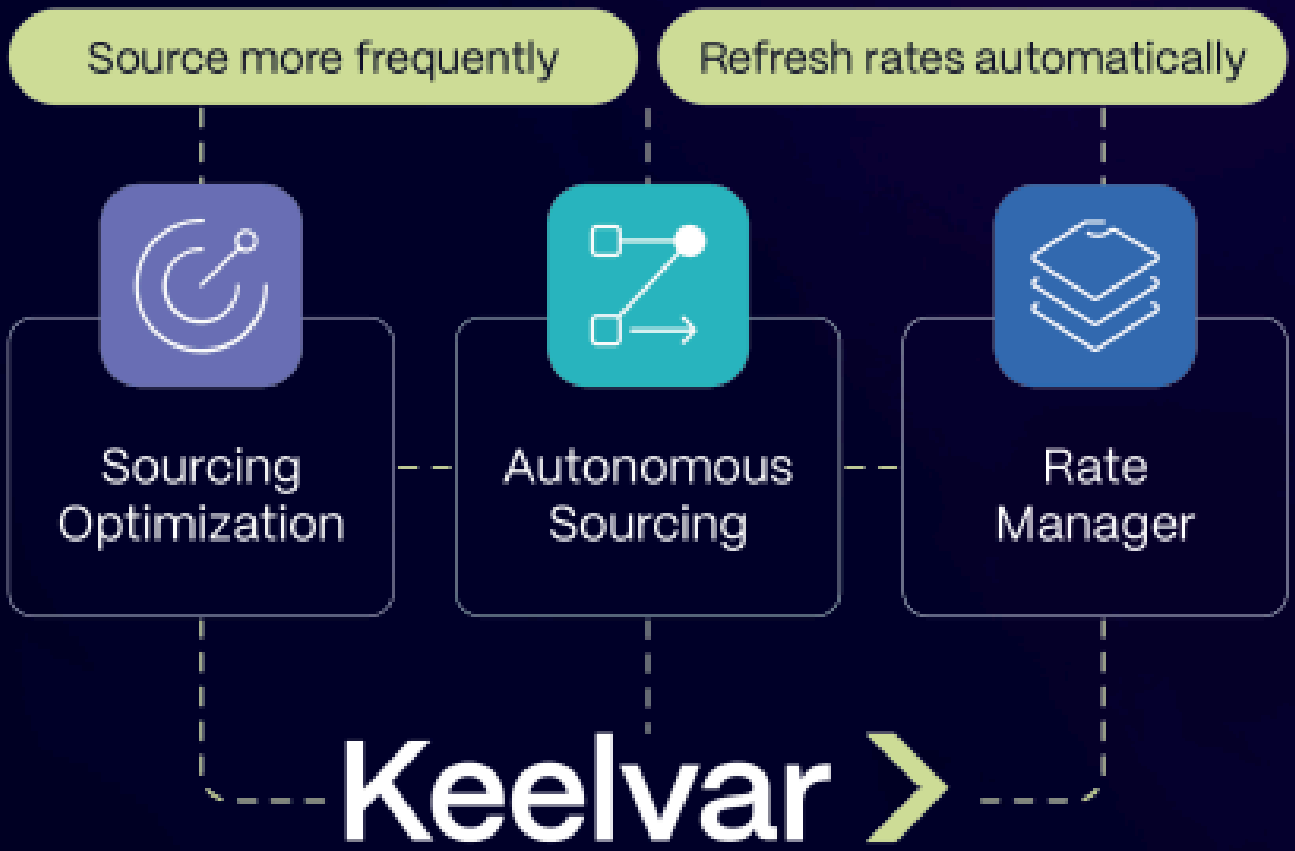
Dr. Marco Tieman
CEO, HSC ALLIANCE

Dr. Marco Tieman is the Co-Founder and CEO of HSC Alliance, with the mission to build an international halal supply chain network. He is also the CEO of LBB International, a supply chain consulting & research firm.

He is an Adjunct Professor with Universitas Ary Ginanjar (Indonesia) and a Senior Fellow with IPMI International Business School (Indonesia), conducting research on halal procurement strategy, halal logistics, halal supply chain management, and halal ecosystems.

He is a board member of the Halal Products Development Company in the Kingdom of Saudi Arabia. He is the author of 'Halal business management: a guide to achieving halal excellence' published by Routledge (London) in 2021. He has a MSc in Industrial engineering & Management Science (Logistics) from Twente University (the Netherlands) and a PhD in Business Management (Halal Food Supply Chain Management) from UiTM (Malaysia). Dr. Marco Tieman is the organising chairman of LogiSYM Indonesia and Malaysia.

Navigate Tariff and Global Trade Volatility with Keelvar



Increase supply chain resilience and reactivity with Keelvar's dynamic sourcing model, powered by a unique combination of advanced sourcing optimization and automation.

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Neste extends partnership with United Airlines to bring sustainable aviation fuel (SAF) to three major US airports

23 October 2025 - Neste and United Airlines have expanded their existing partnership to supply sustainable aviation fuel (SAF) to three new major airports in the United States. The new agreement makes United the first commercial airline to purchase SAF for use on flights from George Bush Intercontinental Airport (IAH) in Houston, Newark Liberty International Airport (EWR) in New Jersey, and Dulles International Airport (IAD) in Washington, D.C.

As part of the agreement, Neste will supply neat Neste MY Sustainable Aviation Fuel™ to United Airlines. The sustainable aviation fuel will be blended with conventional jet fuel before use to meet jet fuel specifications.

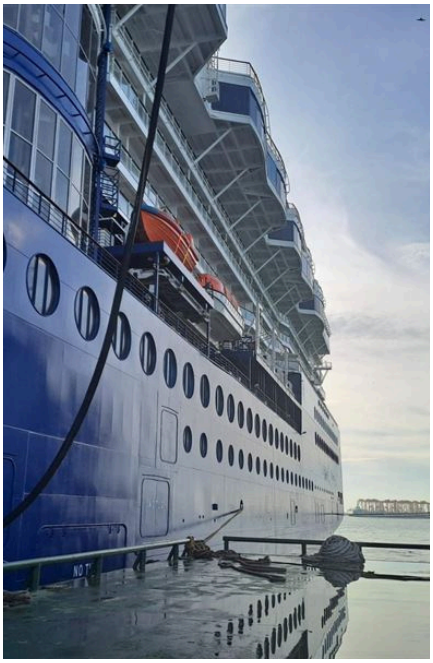
Neste began the SAF deliveries to United at George Bush Airport in July, and they will continue until the end of October 2025. Deliveries of SAF to Newark Airport and Dulles Airport started in September 2025 and are set to continue until the end of 2025. The fuel is delivered to each airport via existing pipeline infrastructure from Neste's SAF terminal facilities in Houston.

"Introducing sustainable aviation fuel for the first time at our hubs in Houston, Newark, and Dulles is another significant milestone in United's sustainability journey," said United Chief Sustainability Officer Lauren Riley. "While United remains the leading SAF user in the U.S., using over 4,300 metric tons (13 million gallons) last year, we recognize that the growth of the SAF market requires support from both state and federal governments. We will continue collaborating with stakeholders, like Neste, across the aviation value chain to encourage policymakers to implement sensible market incentives that promote lower-carbon energy."

"We are thrilled to enable United Airlines to expand SAF use to new markets in the United States. It is crucial that more states enact proven incentive policy frameworks to accelerate the production of SAF and support the aviation industry towards its bold net-zero carbon emission goal by 2050. We remain fully committed to supporting our customers in reducing emissions by scaling our SAF production and supply capabilities," says Carl Nyberg, Senior Vice President, Commercial, Renewable







Hanna Maula
Senior Vice President, Communications, Marketing, Sustainability and Public Affairs

Products at Neste. This new agreement builds on the long-term partnership between Neste and United. Neste has been supplying SAF to United at Chicago O'Hare International Airport since August 2024, after the SAF purchase credit was enacted in Illinois, making United the first airline to use SAF at the airport. Neste MY Sustainable Aviation Fuel has also been used by the airline at San Francisco International Airport in California, where the state's Low Carbon Fuel Standard (LCFS) is supporting the use of renewable fuels.

SUSTAINABLE AVIATION FUEL

Sustainable aviation fuel is a renewable aviation fuel that provides an alternative to conventional, fossil-based jet fuel. With the use of neat (i.e. unblended) Neste MY Sustainable Aviation Fuel™, greenhouse gas (GHG) emissions can be reduced by up to 80%* over the fuel's life cycle compared to using conventional jet fuel. Neste's SAF is made from 100% renewable raw materials, such as used cooking oil and animal fat waste. SAF is certified for commercial use and can currently be blended up to 50% with conventional jet fuel and works seamlessly with existing aircraft engines and fueling infrastructure.

Today, Neste's global SAF production capability is 1.5 million tons (around 515 million gallons) per annum, and it is set to grow to 2.2 million tons (around 750 million gallons) in 2027. *) Calculated with established life cycle assessment (LCA) methodologies, such as CORSIA methodology

Neste has high standards for sustainability and the company has consistently been recognized by several leading sustainability indices. In 2024, Neste's revenue stood at EUR 20.6 billion.

NESTE

NESTE IN BRIEF

Neste (NESTE, Nasdaq Helsinki) creates solutions for mitigating climate change and accelerating a shift to a circular economy. The company is the world's leading producer of sustainable aviation fuel (SAF) and renewable diesel, enabling its customers to reduce their greenhouse gas emissions.

Neste refines waste, residues, and other renewable raw materials into high-quality renewable fuels at its refineries located on three continents. The company's annual renewable fuels production capacity will be increased to 6.8 million tons in 2027.

Asia's Supply Chain Crossroads: Why Cargo Owners Must Unite Against Tariff Turbulence

By **Kendrick Ng**, Chairman of The **Shippers Council**, Logistics and Supply Chain Management Society

6am. The BIS 50% rule lands like a bomb. Eighty-five shippers' phones erupt simultaneously. WhatsApp groups scroll too fast to read. Conference calls stack up. U.S. legal counsel, procurement chiefs, and logistics directors are all online within the hour.

Questions hammer in: Which SKUs hit? Can we reroute? What's the compliance exposure? Barry, a senior logistics director in Singapore, watches his supply chain strategy unravel in real time. This is the new normal. Trump's reciprocal tariffs don't just increase costs. They weaponize trade, turning reliable partners into negotiating chips and stable supply chains into daily crises. What Washington frames as leverage translates across the Pacific as container chaos, margin erosion, and survival-level decisions.
The playbook that worked for 80 years just expired.

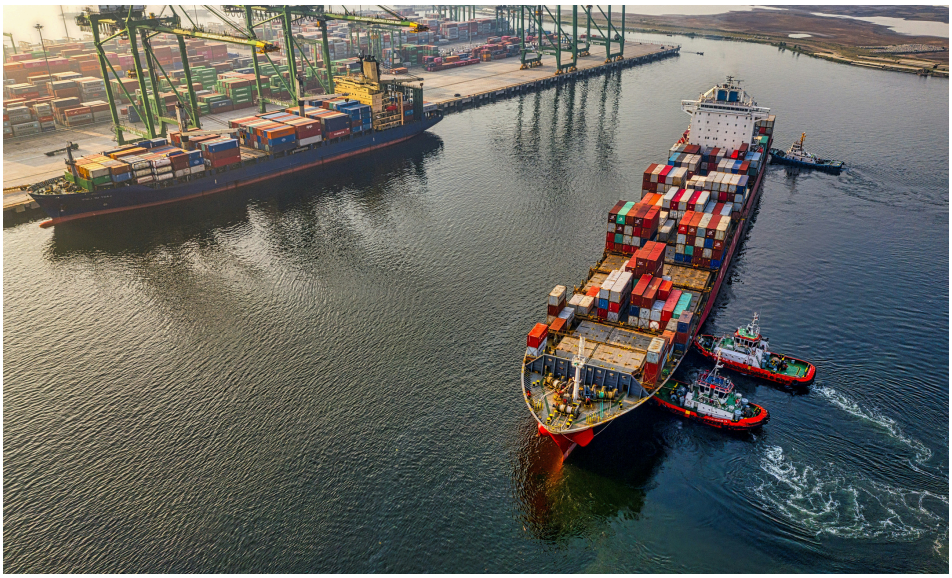
THE CHALLENGE TO RULE-BASED ECONOMICS AND GLOBALIZATION

A fundamental shift is undermining the rule-based trading system that underpinned globalization for decades. In 2025, the United States unleashed unprecedented "reciprocal" tariffs, raising duties as high as 100% in some cases, blatantly violating core WTO principles. Trade policy has become shockingly transactional: President Trump claimed "in many cases, the friend is worse than the foe in terms of trade," justifying tariffs even on close partners like Canada and Mexico.

Such rhetoric signals a dangerous turn toward mercantilism, eroding multilateral norms that once kept global trade stable. Apple Inc.'s experience, reported in CNBC, starkly illustrates this new reality. Despite years of proactive "China+1" diversification, the tech giant found itself trapped when 2025 tariffs struck all its production bases simultaneously: 54% on China, 46% on Vietnam, and 26% on India. The company has accelerated production shifts, such as 15-20% of iPhone manufacturing in India by year-end, and committed $500 billion to U.S. facilities, but yet still faces an estimated $900 million in tariff costs for Q2 2025 alone.

Even when companies hedge their bets across multiple geographies, tariffs can target them all. This fracturing of globalization means no single





company, regardless of size or foresight, can navigate tariff turbulence alone. Members thoughts are 'WTO's silence on MFN erosion is deafening'. ASEAN's traditional stance of non-alignment offers limited protection in a world of ad-hoc tariff broadsides. Asian economies must accept that trade can be weaponized overnight, and collective action is no longer optional, it's essential for survival.

TARIFFS ARE HERE TO STAY

Far from being a short-term negotiating ploy, tariffs have become a permanent fixture of global commerce. Singapore's Prime Minister Lawrence Wong declared that "the era of rules-based globalisation and free trade is over," marking what he called "a profound turning point" in global affairs. For nearly 80 years since the end of World War Two (Pax Americana), America has been the anchor for the free market economies of the world.

It championed free trade and open markets and led efforts to build a multilateral trading system." Now, Wong warned, "We are entering a new phase —one that is more arbitrary, protectionist, and dangerous." A high-tech company announced plans to move 90% of USA-bound product manufacturing outside China by October 2025, selecting Thailand as its primary alternative hub. This multi-year transition where relocating 50%+ of PC production over 2-3 years requires significant capital investment and accepting reduced cash conversion as inventory buffers costs.

They are stockpiling hardware to protect against fluctuations, deliberately choosing resilience over short-term efficiency. This isn't hedging; it's wholesale restructuring based on the conviction that tariffs are structural, not cyclical.
The financial stakes are enormous. Japan's Toyota estimates U.S. tariffs will cost nearly $10 billion in fiscal 2026.

The EU is hiking steel safeguard tariffs to 50%, explicitly aligning with protectionist U.S. policy. Governments rely on tariff leverage. Few want to eliminate tariffs; they are now key strategic levers. Asian cargo owners must focus on disruption-ready, resilient supply chains over mere efficiency. Thriving organizations will embed tariff resilience and collective intelligence via Shippers Council platforms.

MITIGATION CHALLENGES: SYSTEMS THAT FAIL AGILITY

Many companies lack the agility needed for unpredictable tariff shifts. Traditional supply chains value efficiency over rapid response. A recent survey found 77% of manufacturing and supply chain leaders worry about effectively managing resources amid tariff disruptions, while 93% believe trade wars will escalate through 2025.

Over 90% have incorporated geopolitical risk into planning. Even savvy firms encounter diminishing returns on solo mitigation efforts. Apple eliminated the "low-hanging fruit" of tariff exposure, only to find the next layers harder to prune. Cisco relocated manufacturing and sourced parts outside China, yet its CFO admitted *some* products still faced tariffs despite those efforts.

From India's Wipro flagging squeezed IT margins to Hong Kong's Johnson Electric issuing profit warnings as component costs spiked, numerous Asian exporters struggle to pivot quickly. True supply chain agility means rapid reconfiguration or falling behind policy shocks. Collaboration across networks, not just internal change, is essential for agility. Shippers

Councils provide the platform for members to share what's working, what's not, and how to collectively pressure for better customs procedures, FTA utilization, and trade facilitation measures that amplify individual mitigation efforts.

SUPPLY CHAIN INFLUENCERS MUST LEAD

Amid this turmoil, managing tariff risk has become a core strategic function. In leading companies, "One positive is that supply chain now has a seat at the boardroom table," notes one industry CEO, observing growing recognition that end-to-end visibility and resilience must be driven from the top.

Schneider Electric exemplifies this leadership-driven transformation. The company fundamentally shifted its philosophy from "just-in-time" to "just-in-case," deploying AI and automation across supply chain operations to enable rapid reconfiguration. Supply chain leaders elevated to strategic decision-making roles drove this change, leveraging data-driven insights for predictive planning. They cut CO_2 by 75% and earned top SCM recognition. Schneider Electric shows resilience and efficiency can go hand-in-hand.

Be champions of proactive strategy includes advocating for diversification even in good times, running tariff scenario war games, and pushing for technology investments that map cost impacts. Forward-looking firms embed trade compliance and customs experts within cross-functional teams so that tariff impact assessment becomes as routine as cost or quality checks. For instance, companies form tariff SWAT teams that routinely scan bills of materials for opportunities to "tariff-engineer" by altering component materials to shift into lower tariff brackets or sourcing from FTA partner countries.

For Shippers Council members, this leadership role takes on added dimension: convening power. Your collective voice carries weight that individual companies lack. When Shippers Council members unite to advocate for specific customs improvements, preferential FTA access, or regional supply chain infrastructure, governments in Asia listen. When you share intelligence on emerging tariff threats or successful mitigation tactics, every member benefits. Leaders must be strategists and ambassadors; councils multiply your impact.

CALL TO ACTION: UNITE FOR AGILITY IN PERPETUAL DISRUPTION

The message for Asia's supply chain and trade strategy community is urgent: Collective action is overdue. Tariff disruptions aren't a one-off storm; they're the new climate where no company can do this alone.

This is where Shippers Council membership becomes not just valuable but essential. Consider what collective action enables: Embed tariff resilience through shared intelligence. Treat tariffs as a daily management variable. Design supply chains for pivoting fast. Leverage FTAs like RCEP and CPTPP. But don't do this in isolation. Sharing real-time efficacy of FTAs, bottlenecks, and sourcing accelerates learning for all. The goal: if tomorrow a 25% tariff hits your top export market, your team can within days execute a plan because you're leveraging collective intelligence, not starting from



scratch. Close regional gaps through collaborative innovation. ASEAN's centrality gives the region access to multiple major markets, but political neutrality isn't a shield. The recent surge in Southeast Asia's exports was often built on re-routing Chinese inputs to avoid tariffs and may not be sustainable.

Companies need to invest in genuinely localizing component and material production. But here's where collaboration matters: Imagine a pan-ASEAN Shippers Council forum that rapidly disseminates best practices on using Singapore's FTZ facilities, Indonesia's bonded zones, or Vietnam's emerging component suppliers. Individual companies struggle to map these options; collective intelligence makes them accessible.

Shippers Councils can coordinate supplier qualification initiatives, share due diligence on tariff-friendly sources, and even negotiate collectively for better logistics infrastructure. Build capability through community. Western firms are ahead: over two-thirds are actively onshoring or near-shoring production to mitigate tariffs. Many use advanced scenario-planning software. Asian companies risk falling behind. But acquiring these capabilities is expensive and time-consuming for individual firms. Councils enable shared capability-building: joint workshops, tool procurement, and trade expertise. The Council accelerates everyone's capability.

THE COMPETITIVE ADVANTAGE OF COLLECTIVE AGILITY

Tariff volatility demands collaborative reinvention. Asian supply chain leaders have navigated intense disruptions before and proven their mettle. Now, they must apply that resolve to trade policy volatility but not in isolation. The challenge to the old globalization order is real, but it's also an opportunity: those who act decisively to embed tariff resilience through collective action will gain a competitive edge. The world's supply chains are being rewired, and Asia stands at a crossroads. Will its businesses be mere spectators or proactive shapers of their destiny?

The answer depends on what we do together today. Asian supply chain influencers must lead from the front and they must lead together. Join your peers in the Shippers Council. Share your challenges and solutions. Build the intelligence network and collaborative capabilities that enable rapid response to perpetual disruption.
Survival goes to the most connected, not the biggest player. Your membership in the Shippers Council isn't just about networking; it's about survival and competitive advantage in an age where agility through community is the path forward.

COLLABORATIVE LEADERS WILL DRIVE RESILIENT FUTURES FOR THEIR ORGANIZATIONS AND THE REGION.

As Chairman of the Shippers Council, I invite any like-minded organisation to be part of this essential community. Together, we can transform perpetual disruption into sustained competitive advantage for Asian cargo owners. The question isn't whether tariff turbulence will continue, but whether you'll face it alone or with the collective strength of your peers.



Kendrick Ng

Chairman
The Shippers Council, Logistics and Supply Chain Management Society

As an influential and strategic supply chain professional with more than 20 years of experience in Hi-Tech manufacturing, Kendrick believes that all companies can maximise their competitive advantage through an agile and optimised supply chain ecosystem. He is the Chairman of the Shippers Council, where he has the opportunity to build logistics excellence within the supply chain community and be the conduit for Shippers' voice.

Sustainable Apparel Brand Ultifresh Rolls Out 60 Vending Machines Across APAC and Singapore, Driving Affordable Sustainability

ltifresh has launched Singapore's first apparel vending machine network, a model that merges sustainable retail innovation with social impact, employing Financial Assistance (FAS) students at $30 per hour to drive both affordability and inclusion in sustainability.

SINGAPORE, 7 November 2025 — Homegrown sustainable apparel brand Ultifresh has launched a first-in-region apparel vending machine, expanding across Asia Pacific with 60 machines rolled out in just four months. The initiative integrates sustainability, affordability, and social inclusion, offering essential wear to consumers anytime, anywhere, while creating work opportunities for Financial Assistance (FAS) students.

With the global vending machine market set to hit USD 72.46 billion by 2030, this rollout marks vending as the next frontier in retail, combining 24/7 access, lower overheads, and instant convenience. Through this vending model, Ultifresh leverages its ISO-certified manufacturing capability to deliver sustainable basics at scale without traditional retail overheads.

The machines are located in high-traffic zones such as transport interchanges and neighbourhood malls, allowing greater access to affordable, sustainable apparel. Its flagship Performance Series T-shirts, priced from $4, are designed for tropical climates and daily rewear, using antibacterial, quick-dry, and odour-control fabric that eliminates up to 99.94% of bacteria. The material's self-sterilising properties reduce the need for frequent washing, extending garment lifespan and lowering water and energy consumption.

"In this hot and humid climate, hygiene is key. We have made breathable, quick-dry wear apparel and made it available on the go to busy commuters," said Gerald Eng, Co-founder of Ultifresh. "Vending makes sense for sustainable basics; it's space-efficient, convenient, and where people already are. Bringing two well-accepted ideas — sustainable clothes and vending machines — together has brought this project to life."

As part of the rollout, the Founder, Frank Yap, continues his long-standing commitment to youth empowerment by hiring FAS students at $30 per hour to support the vending operations. The initiative underscores Ultifresh's belief that sustainability should extend beyond materials to include equitable employment and community support, a move that reflects the brand's belief in pairing social impact with sustainable business growth.

"I have always believed in empowering FAS students and rewarding them fairly for their contributions," said Yap. "Paying them above market



Frank Yap, Founder of Ultifresh launched Singapore's first apparel vending machine, merging sustainability with affordability and youth empowerment.

rate is just a form of giving back, a small way to make sustainability more human and inclusive."
The vending machines are already available at AMK Hub, Bukit Timah Plaza, Taste Orchard, Tampines Mart, White Sands, Hougang Bus Interchange, and Eunos Bus Interchange, as well as selected heartland areas. Mall-based machines can operate up to 1am, while those at bus interchanges or in heartland locations provide 24/7 access for commuters.

Taking the campaign a step further, Ultifresh is letting its customers take charge of the narrative with the *Vibe Check Challenge & Lucky Draw*.

The online campaign is set to be paired with the vending rollout, inviting customers to showcase their re-wear journey online and how they utilise the unique features of the fabrics to re-wear their antibacterial tees multiple times between washes.

Select t-shirt boxes within the machines will contain a surprise challenge card, nudging buyers to post their looks on Instagram or TikTok with *#UltifreshChallenge* and @ultifresh, turning everyday practicality into a community-driven social movement.
With malls, transport hubs, and cross-border commuter zones as target locations, the brand aims to create frictionless access to sustainable basics for a wider Southeast Asian audience, reflecting its ambition to make sustainability both scalable and practical across urban centers in the region.

Following its Singapore launch, Ultifresh has more than 30 machines in Singapore.

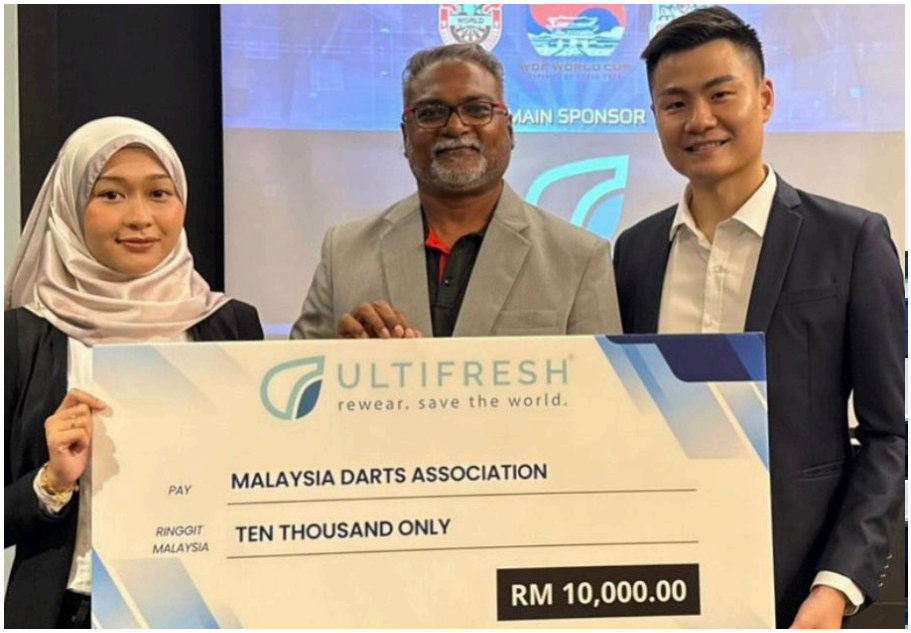
The brand is also expanding its vending machine network across the causeway to Malaysia, with 10–20 machines already located in Prangin Mall, Penang, and KSL City Mall, Johor Bahru, respectively. Beyond Malaysia, Ultifresh has also established vending machines in China and Jakarta's LRT stations, including LRT Boulevard Utara Summarecon Mall Station and LRT Velodrome Station.

ULTIFRESH
anti-bacterial & anti-odor

About ULTIFRESH

Ultifresh, founded by Frank Yap and Gerald Eng in Singapore in 2018, aims to become a global leader in sustainable apparel manufacturing, expanding its reach and influence across Malaysia, Singapore, and beyond.

The brand's products are designed with anti-microbial properties, enabling them to self-sterilise and eliminate 99.94% of odour-causing bacteria, thereby preventing bacterial growth and making Ultifresh a safer and longer-lasting apparel choice for companies looking to supply clothing to customers and staff. So far, Ultifresh has successfully catered to a diverse range of customers, establishing a strong presence in various industries; including automotive giants like Honda and Audi, tech leaders such as Samsung, Intel, and Meta, and other prominent brands like Maggi, Swatch, and Ambank Group.







Global Trade & Tariffs: Navigating Trends, Shifts, and Compliance Challenges

By **Kim Winter**, Founder & Group Managing Director **Logistics Executive**

In 2025, global trade stands at a turning point. After years of liberalized markets and just-in-time supply chains, companies and governments are grappling with a new reality defined by volatility, tariffs, and rising compliance demands. For senior supply-chain executives, the priority has shifted from pure cost optimization to resilience, regulatory awareness, and strategic geography.

This article explores the evolving trade landscape, including global versus local trade dynamics, near-shoring and re-shoring strategies, and the growing weight of corporate compliance.

THE CURRENT TRADE AND TARIFF LANDSCAPE

1.1 Global Picture

World merchandise trade volumes in 2025 are largely stagnant. After moderate growth in 2024, global trade is now hovering around zero, with some forecasts suggesting a slight rebound driven by AI-related goods and inventory rebuilds. The era of frictionless global expansion appears to be ending, replaced by structural constraints and higher costs.

1.2 Tariffs and Policy Volatility

Tariffs have evolved from temporary protectionist tools into strategic economic levers. The United States, for instance, has implemented new baseline tariffs and reciprocal measures against multiple trade partners, creating ripple effects across industries.

Trade policy uncertainty has become a measurable drag on growth. Despite forecasts of moderate expansion, analysts estimate tariffs and policy shifts could reduce overall global trade growth by more than a percentage point annually. For exporters, the financial burden of regulatory compliance and customs complexity continues to mount.

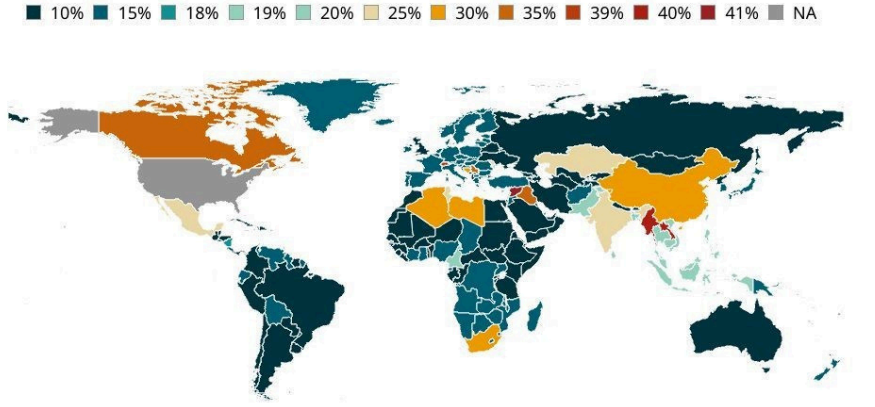
1.3 International vs. Local Trade

Cross-border trade faces increasing headwinds: complex customs procedures, volatile tariffs, and changing preferential trade arrangements. Emerging markets are particularly vulnerable, as they rely heavily on exports.

By contrast, regionalized trade —producing and sourcing closer to consumption markets—is gaining favor. It offers shorter lead times, reduced tariff exposure, and greater agility. For many companies, the strategic choice is shifting from global cost efficiency to regional resilience.

Global Distribution of U.S. Import Tariff Rates

Presidential tariff modifications as of July 31, 2025



Source: whitehouse.gov

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1.4 Implications for Supply Chain and Air Cargo

For logistics, air freight, and network development leaders, these shifts are significant:

·Rising tariffs alter landed costs and margins.

·Near-shoring and re-shoring demand network redesign and flexible infrastructure.

·Compliance failures carry real financial and reputational risks.

·Variable costs—from duties to logistics bottlenecks—are climbing, demanding closer cost control and strategic procurement alignment.

2. NEAR-SHORING AND RE-SHORING: THE NEW STRATEGIC PLAYBOOK

2.1 Understanding the Shift

Near-shoring means relocating production closer to end markets—such as U.S. firms moving operations to Mexico or Southeast Asia.
Re-shoring involves bringing manufacturing back home, reversing previous offshoring decisions.Key drivers include tariff escalation, geopolitical risk, pandemic aftershocks, supply-chain fragility, and sustainability goals. Rising labor costs in traditional manufacturing hubs, coupled with political uncertainty, have made local or regional production more attractive

2.2 Evidence of Change

Industry research shows that over 90% of retail executives are now pursuing near-shoring or re-shoring initiatives. The 2025 tariff wave affecting more than 90 countries accelerated the move toward regional supply chains. However, success depends on infrastructure readiness, skilled labor, cost competitiveness, and supportive policies.

2.3 Logistics and Air Cargo Implications

As production shifts closer to markets, freight flows are transforming:

·Long-haul intercontinental shipments are giving way to more frequent regional movements.

·New corridors—Mexico–U.S., North Africa–Europe, India–Africa—are gaining importance.

·Air cargo networks must adapt to shorter, higher-frequency routes and flexible capacity models.

·Procurement and supplier strategy must integrate tariff modeling and scenario analysis into planning.

·Variable costs now include tariff exposure, additional logistics handling, and dual-sourcing premiums.

2.4 Emerging Hubs

Latin America and the Middle East are becoming focal points for regional trade. Mexico's role in North American supply chains is strengthening, while Middle East and African hubs are evolving as bridges between Europe and Asia. These shifts will redefine airport and cargo infrastructure priorities across multiple regions.

3. COMPLIANCE AND TRADE RISK MANAGEMENT

3.1 Compliance as a Business Imperative

Tariffs are only one dimension of the broader compliance challenge. Companies face heightened scrutiny in areas such as:



·Rules of Origin:

Misinterpretation can lead to heavy fines or disqualification from preferential duties.

·Customs Valuation: Disputes over product classification (part vs. finished good) affect tariff rates.

·Transshipment Risks: Some firms rerouting through lower-tariff countries face penalties for origin manipulation.

·Free-Trade Zones (FTZs): Increasingly used to defer or reduce duty exposure.

3.2 Embedding Compliance in Strategy

To manage risk, leading firms are integrating compliance into every stage of their supply chain design:

·Establish end-to-end visibility of shipments, routes, and duty exposure.

·Use scenario modeling to anticipate tariff changes and logistics delays.

·Conduct regular supplier audits to ensure upstream compliance.

·Integrate tariff modeling into landed-cost analysis and pricing decisions.

·Invest in digital systems and training to ensure teams can monitor and report compliance effectively.

3.3 Recent Examples

The 2025 U.S. tariff hike on Mexican metals and auto parts —doubling some duties— surprised firms that had relocated from Asia to Mexico. Similarly, trade tensions between the U.S. and India demonstrated how geopolitical disputes can abruptly reshape tariff regimes and market access.

4. STRATEGIC IMPLICATIONS FOR TRADE AND SUPPLY CHAINS

4.1 Rethinking Trade Geography

Three sourcing models are emerging:

· Global sourcing remains vital but comes with higher risk premiums.

·Regionalized sourcing offers tariff stability, faster turnaround, and greater resilience.

·Hybrid models such as dual-sourcing and “friend-shoring” enable flexibility amid policy shifts.

For air-freight networks, this means focusing on regional corridors—Middle East–Africa, India–Africa, and Latin America–U.S.—rather than only long-haul intercontinental flows.

4.2 Managing Variable Costs

Rising variable costs—fuel, duties, customs delays—demand integrated financial control.

Key actions include:
·Embedding tariff and duty exposure in lane and product cost models.

·Partnering with procurement to mitigate supplier and geographic risk.

·Evaluating near-shoring opportunities where cost and service advantages align.
·Balancing inventory buffers against tariff-avoidance savings.

4.3 Network and Infrastructure Adaptation

Regional sourcing changes the physical flow of goods.

Stations, hubs, and airports must adapt to:
·More intra-regional traffic and







short-haul operations.
·Higher shipment frequency with smaller lot sizes.

·Greater automation in customs, visibility, and documentation processes. Facilities that can rapidly adjust to new regulatory requirements will outperform slower competitors.

4.4 Talent and Procurement Priorities

As leadership transitions and growth goals intensify, the next generation of procurement and logistics leaders must demonstrate:

· Strong understanding of trade policy and tariff management.

· Experience managing re-shoring transitions and redesigning networks.

· Data-driven decision-making through advanced systems and analytics.

·Proven ability to align procurement and station performance with broader trade strategies.

5. KEY TRENDS SHAPING 2026

5.1 Rise of Regional Trade Blocs

Free-trade agreements are gaining renewed importance as tariff walls rise. Recent deals such as the India–EFTA agreement illustrate how companies aligning supply geography with favorable trade zones can retain competitiveness.

5.2 Fragmentation of Global Value Chains

The global supply chain is evolving into multiple regional ecosystems. Instead of a single integrated network, we are seeing Asia, Europe, the Americas, and MENA each forming semi-autonomous trade clusters. For air-cargo and logistics, this means designing networks that optimize regional flows and interconnectivity.

5.3 Technology and Data Visibility

Digital systems enabling real-time duty modeling, compliance monitoring, and shipment tracking are becoming critical differentiators. Advanced analytics tools support strategic sourcing and reduce the risk of costly tariff surprises.

5.4 Tariff-Driven Cost Inflation

Tariffs act as indirect cost inflation, affecting pricing and profitability. Firms that incorporate tariff modeling into procurement and pricing decisions will manage margins more effectively than those reacting after the fact.

5.5 Sustainability and ESG Alignment

Near-shoring and regional production are not just economic choices—they align with environmental and social goals. Reduced transport emissions, local employment, and shorter lead times contribute to sustainability objectives, strengthening corporate reputation alongside cost efficiency.

6. ACTION PLAN FOR SUPPLY CHAIN LEADERS

1. Update landed-cost models to include tariff and duty scenarios (+10%, +25%, etc.).

2. Map supplier origin risks and assess compliance vulnerabilities.

3. Evaluate near-shoring potential in key markets like the Middle East, Africa, and South Asia.

4. Redesign network flows to accommodate smaller, faster regional movements.

5. Strengthen trade compliance systems through training, audits, and automation.

6. Align procurement and freight metrics to ensure the sourcing strategy supports operational efficiency.

7. Track global trade policy developments to anticipate disruptions.

8. Balance cost and resilience through diversified sourcing and contingency planning.

9. Engage executive leadership with dashboards and data-driven briefings on trade exposure.

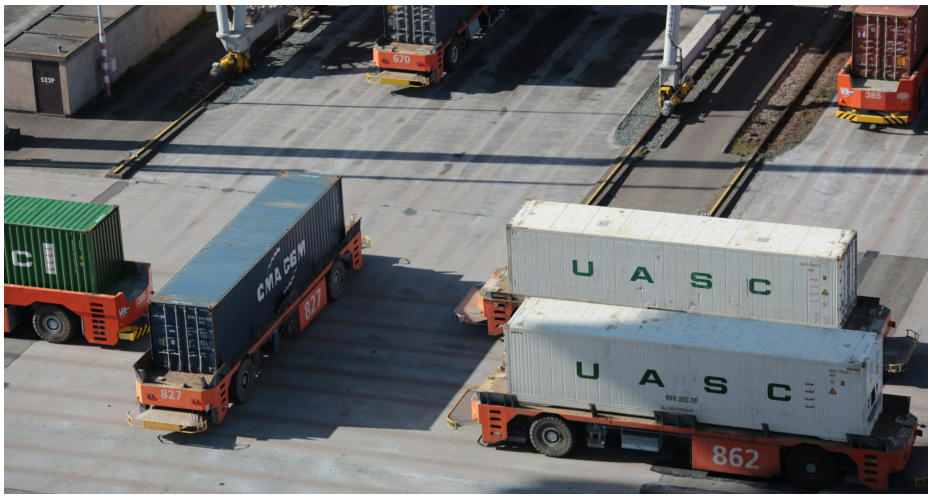
CONCLUSION

As of late 2025, global trade is undergoing structural change. Tariff escalation, geopolitical fragmentation, and the pursuit of resilience are redefining how companies design their supply chains.

For executives in air freight and network development, this transformation presents both risk and opportunity:

- Risks: rising landed costs, supply disruption, and compliance complexity.
- Opportunities: regional growth corridors, enhanced agility, and strategic differentiation through visibility and sustainability.

By embedding tariff modeling, compliance, and near-shoring strategy into business planning, organizations can position themselves to thrive in a fragmented yet more resilient global trade environment.

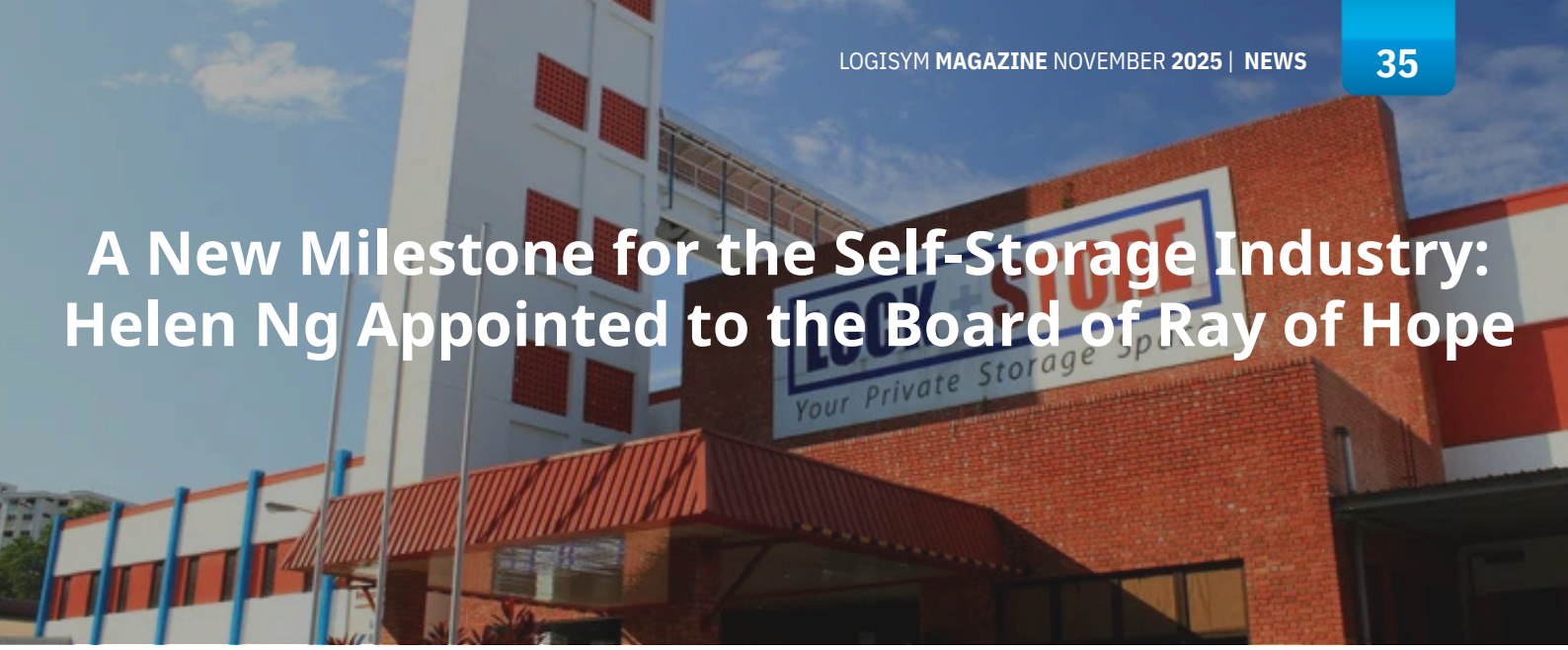




Kim Winter
Founder & Group Managing Director Logistics Executive

The founder of Logistics Executive Group, Kim delivers 40 years of executive leadership experience spanning Executive Search & Recruitment, Leadership Development, Executive Coaching, Corporate Advisory, Consulting & M&A, Media Interviews & Vodcasts, across the Supply Chain, Logistics, 3PL, E-commerce, Life Science, Cold Chain, FMCG, Retail, Maritime, Defence, Aviation, Resources & Industrial sectors.

He is a regular contributor of thought leadership to industry and media, is a professional Master of Ceremonies and is frequently invited to chair / moderate face-to-face international events and media platforms.



A New Milestone for the Self-Storage Industry: Helen Ng Appointed to the Board of Ray of Hope

Singapore, 24 October 2025 - The self-storage industry marks a new milestone in corporate social responsibility (CSR) leadership with the appointment of Helen Ng, Chief Executive Officer of General Storage Company and Chair of the Self Storage Association Asia (SSAA), to the Board of Ray of Hope, a Singapore charity with Institution of a Public Character (IPC) status.

Ray of Hope is dedicated to addressing emerging and unmet social needs in Singapore by providing transparent crowdfunding support to individuals and families in crisis. As a newly appointed Board Member and active participant on the charity's Fundraising Committee, Helen brings to the organisation her strategic leadership, operational experience, and deep commitment to building sustainable community impact.

Her appointment underscores the growing recognition of the self-storage industry's role in advancing CSR and good governance. Under Helen's leadership, General Storage Company -operator of Lock+Store in Singapore and Malaysia, and The Store House in Hong Kong - has championed numerous community initiatives, including partnerships with Ray of Hope and Hong Kong Dog Rescue, reflecting the company's belief that businesses can and should be a force for good.

"I'm deeply honoured to join the Board of Ray of Hope," said Helen Ng, CEO of General Storage Company.

"At its heart, Ray of Hope embodies the same values that guide our work at General Storage Company - empathy, transparency, and a commitment to creating lasting impact. This appointment represents how industries like ours can contribute meaningfully beyond the business sphere."

Helen's appointment represents not only a personal achievement but also a milestone for the self-storage community, demonstrating how the sector's leadership continues to extend its influence into the wider social and charitable ecosystem.

About GENERAL STORAGE COMPANY

About General Storage Company
General Storage Company is a leading self-storage operator with a regional presence across Singapore, Malaysia, and Hong Kong through its brands Lock+Store and The Store House. The company offers secure, flexible, and accessible storage solutions for individuals and businesses.

A recognised leader in corporate social responsibility, General Storage Company integrates sustainability and community engagement into its operations through initiatives such as solar panel installations, edible gardens, and EV chargers in Singapore, and partnerships with social enterprises and charities across the region.



THE GREEN CORRIDOR

SMUGGLING WILDLIFE

Poor IWT Detection in the Logistics and Supply Chain Industry is Killing Bio-diversity

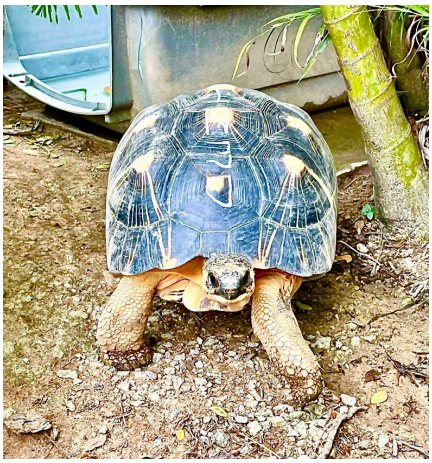
by **Timothy Foote**, Director Transportation & Network APAC at **Asendia** and Founder of **Susymbio**

Murder, robbery, and hit-and-runs—these are crimes that hit the pages of local and international news every day. Less publicized crimes are those of the illegal wildlife trade (IWT). This is essentially the illegal capture and smuggling of our planet's most endangered species over borders. The real-life "snakes on a plane" type crime that endangers not only vulnerable species from extinction but also our present and future health on this planet.

VICTIMS IN OUR MIDST

On a recent trip that I took to ACRES, it was once again highlighted to me that the evidence of continuing illegal wildlife trade and the cruelties involved with it are always easy to find. ACRES stands for the Animal Concerns Research & Education Society. This is a non-profit organisation that aids Singaporeans with the rescue and care of animal life that has either been trapped in our general living spaces or injured somehow by our urban infrastructure (for instance, an owl that somehow gets trapped in someone's living room).

ACRES operates with compassion and care, with the animal's needs front of mind. During the course of their operations, they are often brought into scenarios where they need to rescue and care for wildlife that have been smuggled into Singapore and is now essentially trapped here. Denise (seen below) is just one example.



Walking the grounds of the ACRES Wildlife Rescue Centre in the West of Singapore, you will come across Denise. She's just one among the many other rescued animals that the team there takes care of.

Denise is an Indian star tortoise, a species not permitted for export from India, yet Denise is just one of scores of Indian star tortoises that have found their way somehow to ACRES in Singapore. Anbarasi Boopal, a good friend of mine who worked with these creatures for years, tells me the story of Denise and others. Working at ACRES for over 15 years, she knows all about the animal victims of IWT. These animals are robbed from their native wilderness, where they are then shipped out via parcels, luggage, personal carriers, or smuggling in larger consignments. They are transported to Singapore either by truck, plane, or ship, sometimes hidden and sometimes simply mis-declared as a legal species of turtle as part of a wildlife shipment.

Many IWT collectors in Singapore keep the pets on their private property. Occasionally, when the turtles get bigger or become ill, the collector simply dumps the animal into the streets.

In Denise's case, luckily someone called ACRES to the rescue, and she was able to cared for by a trained wildlife care team. She is still at ACRES today because repatriation of wildlife is, to say the least, a complicated endeavour (it requires DNA tests amongst other challenges).

COLLATERAL KILLING

Denise is also lucky to be alive when you consider all the other animals that are killed in the IWT process. Animals in all parts of the world die in the course of being captured, handled, transported and

finally forced into a life of captivity (nearly always by people with little specialised knowledge or concern with regards to the animals' needs). Collectors as well often get in over their head when trying to take care of wild animal species because they are simply not sufficiently equipped or knowledgeable.

SMUGGLING REQUIRES TRANSPORTATION

The collection of IWT victims at ACRES and other wildlife sanctuaries, were all moved illegally via our very own logistics and supply chain industry. Rare and endangered species were packed (in parts or as a whole) into boxes, bills of lading arranged, commercial invoices made, and customs cleared via the global logistics system that we manage. For IWT sent in cargo shipments, in many cases the shipment appears as legitimate international movements of legitimate commodities. Unfortunately, the descriptions declared are simply fabricated.

A more notorious example of smugglers misdirecting authorities comes from the passenger travel industry. In 2010 a living tiger cub was found by Bangkok Customs in the luggage of a passenger / smuggler who declared to officials before the seizure that she was transporting toys!!

HOW NOT TO BE AN ENABLER?

Two years ago, INTERPOL estimated the annual illegal wildlife trade to be a 20 billion dollar illegal business. Though it may be difficult to identify shipments that have intentionally fabricated contents, there are things we can do to prevent the shipment of IWT. In order to protect the remaining wildlife we have on this planet and to fight against criminal organisations that profit from this trade, look into starting a program to detect and stop IWT.

Get trained! TRAFFIC Southeast Asia (a globally recognized NGO involved with fighting IWT) has courses for all cargo and passenger travel staffers. I spoke with Renee Yee, who works for TRAFFIC Southeast Asia, to see what is available. TRAFFIC Southeast Asia has worked with law enforcement, policymakers, conservationists, and industry to record the moves of wildlife trade and, as best they can, the illegal wildlife trade.

With grants from the USAID Routes program, they have put together training materials for employees working in our industry to detect IWT shipments. These are centered mostly on air and ocean transportation sectors.

Currently, I am using some of those materials to enhance my organisation's security training and procedures for our air parcel business. Renee can likely help you too. Just contact me, and I will do my best to link you up with her and TRAFFIC Southeast Asia's training programs.





Timothy Foote
DirectorTransportation & Network APAC at Asendia and Founder of Susymbio

Tim has worked in management positions at multiple MNCs for more than 25 years, gaining expansive expertise in logistical operations. Tim continues to craft delivery solutions for many e-commerce clients at Asendia. Once a regional Head of Go Green at DHL eCommerce, Tim now works for customers to decarbonise their logistics by managing Asendia's 100% carbon-neutral network.
To further promote a net zero future for the logistics industry, Tim created MOVE GREEN. This is a movement committed to greening the logistics industry during this time of transformation. Please join the companies making a pledge to become net zero by going to Susymbio.com for more details.



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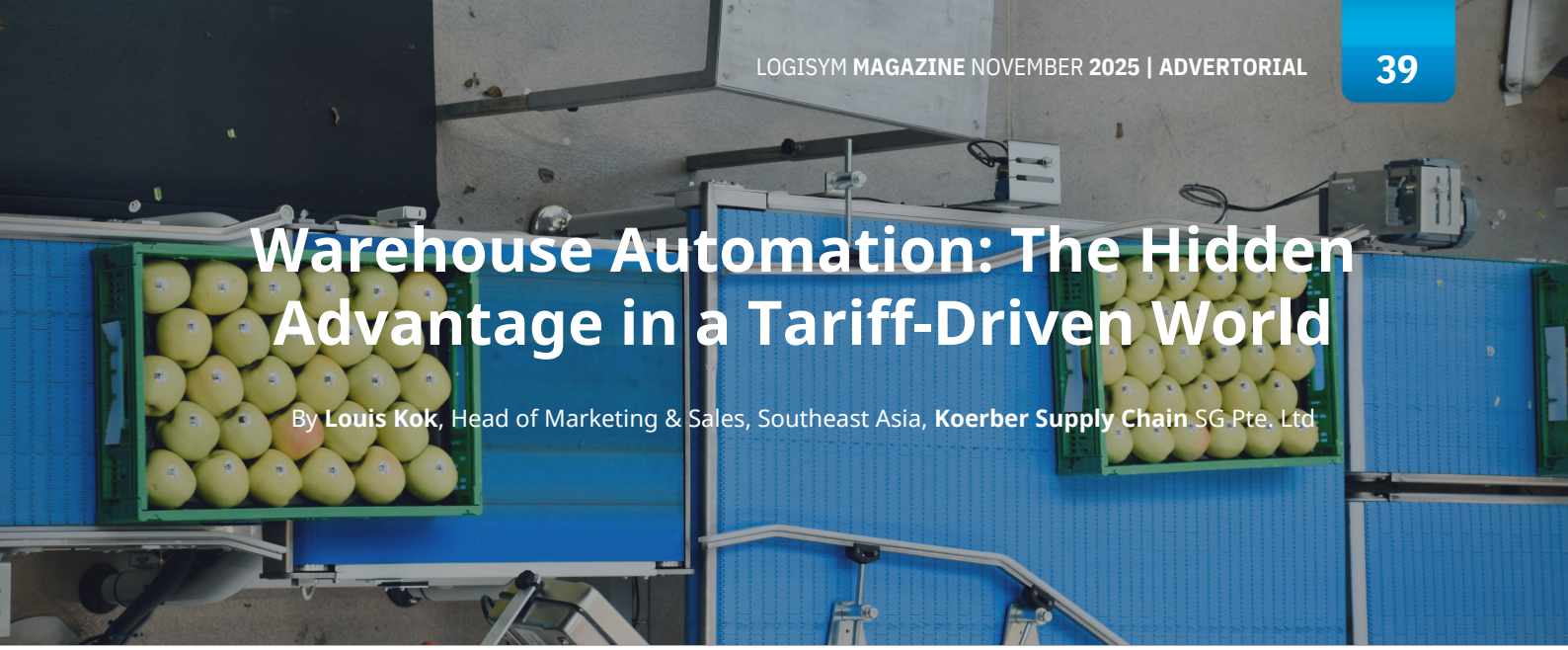
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Warehouse Automation: The Hidden Advantage in a Tariff-Driven World

By **Louis Kok**, Head of Marketing & Sales, Southeast Asia, **Koerber Supply Chain** SG Pte. Ltd

As trade policies and global relations continue to reshape the movement of goods, supply chains are adapting faster than ever. International trade has become increasingly unpredictable, with shifting tariffs, local regulations, and regionalization strategies forcing businesses to rethink how they source, store, and distribute products. Amid this volatility, warehouse automation has quietly become one of the strongest enablers of resilience, transforming warehouses from static cost centers into agile, adaptive systems that can absorb the shocks of global trade.

The rise in protectionist policies and tariff measures across major economies has disrupted traditional trade flows. Manufacturers, logistics providers, and 3PLs have been compelled to diversify, shifting sourcing bases, redesigning routes, and expanding regional warehousing capacity.

These changes have put enormous pressure on warehouse operations to handle fluctuating volumes, varying product mixes, and growing compliance demands. At Körber, we see automation as the strategic buffer in this environment. Beyond efficiency, it brings stability, scalability, and flexibility to logistics operations. Systems such as autonomous mobile robots (AMRs), automated storage and retrieval systems (ASRS), and robotic picking solutions help maintain productivity even when external conditions change. They ensure consistent throughput, accuracy, and cost predictability independent of labor challenges or policy uncertainty.

A major advantage of automation is its adaptability. As sourcing networks evolve, automated systems can be reprogrammed or reconfigured to handle new product profiles or workflows with minimal downtime. A warehouse managing imports from China today can easily adjust to goods from Vietnam or India tomorrow. For 3PLs operating across multiple markets, this agility is invaluable; it prevents supplier or tariff changes from becoming operational bottlenecks. The growing shift toward nearshoring and regional distribution is further accelerating automation adoption.

Many global brands are setting up localized fulfillment centers to reduce dependence on long-haul imports and serve regional markets faster. While operating closer to customers often brings higher labor costs, automation offsets this by improving throughput and space utilization, enabling efficient operations even in high-cost regions. Southeast Asia sits at







center of this global trade rebalancing. As manufacturers diversify from traditional production hubs, countries such as Vietnam, Thailand, and Malaysia have become preferred alternatives, offering cost advantages, proximity to major markets, and expanding logistics infrastructure.

Many companies are expanding production here to minimize tariff exposure, while others use the region as a manufacturing and distribution bridge between Asia, the Middle East, and Oceania. The region is fast evolving into a smart logistics corridor linking Asia's trade ecosystems.

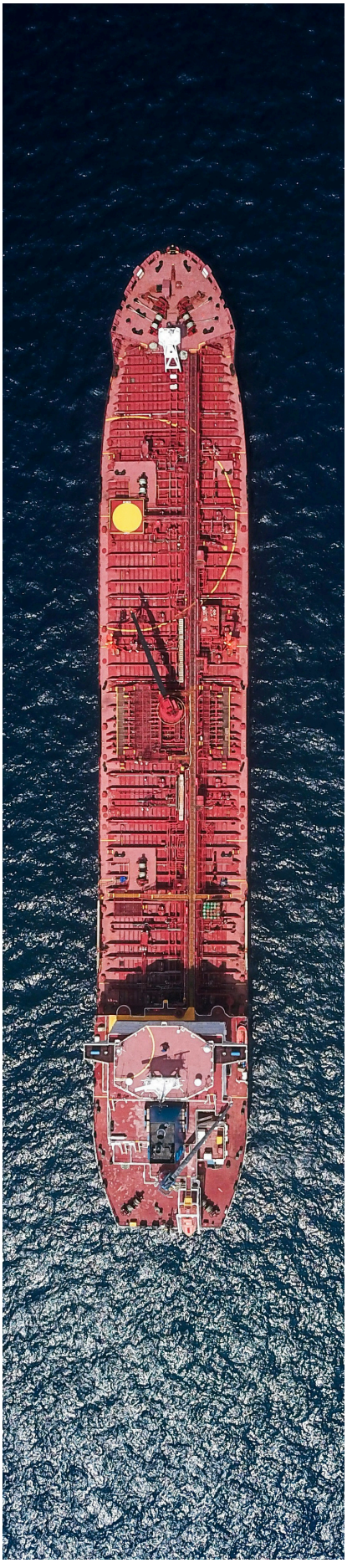
This shift has created significant opportunities for 3PLs and warehouse operators. Logistics networks are being upgraded to support cross-border trade and multi-country distribution within ASEAN. Automation is being adopted to handle diverse product categories, faster delivery expectations, and growing compliance needs. Warehouses in Vietnam and Thailand are now being designed with automation-ready infrastructure, allowing rapid scaling as demand increases. The 2025 U.S.–China tariff escalation, for instance, raised costs for some imports but also accelerated diversification, with Southeast Asia emerging as a major beneficiary.

Regional logistics providers have seized the moment by deploying automation to manage higher trade volumes and create adaptable infrastructure supporting multiple clients and product lines.

In this sense, automation is no longer just a productivity tool but a foundation for competitiveness in a regionalized trade environment. Automation also addresses space and labor challenges that accompany this growth. Many companies, responding to trade uncertainty, are holding higher safety stocks, leading to storage constraints. ASRS systems maximize capacity, often doubling storage within the same footprint, a vital advantage in dense industrial hubs like Singapore or Jakarta. At the same time, automation reduces reliance on unpredictable labor markets, ensuring continuity even when workforce availability fluctuates.

Beyond efficiency, automation has become a key compliance ally. In today's regulatory climate, every cross-border shipment requires transparency, from country of origin to customs classification. Automated systems ensure error-free data capture, reducing the risk of costly documentation lapses or customs delays.

This is particularly critical for exporters operating across multiple trade zones, where one incorrect declaration can trigger penalties or shipment holds. While automation projects can face hurdles such as higher initial costs or occasional supply-chain delays the long-term benefits far outweigh the risks. Regions



investing in automation are already showing faster recovery and higher efficiency gains after trade disruptions. The growing adoption of automation across ASEAN reflects this momentum. Ultimately, in a world where tariffs, trade barriers, and geopolitical shifts have become the norm, warehouse automation offers control.

It helps businesses transform uncertainty into opportunity, enabling them to pivot quickly, maintain cost stability, and meet customer expectations without interruption.

Trade policies will continue to evolve, but one truth endures: warehouses that invest in automation will move faster, operate smarter, and stay resilient, no matter how turbulent the global trade winds become. Facing tariff volatility or regional trade shifts?

Discover how Körber's automation solutions can help you minimize tariff exposure, strengthen supply chain flexibility, and future-proof your operations. Connect with our experts at info.sc.sgp@koerber-supplychain.com or visit www.koerber-supplychain.com to explore solutions built for a changing trade landscape.



Louis Kok

Head of Marketing & Sales Southeast Asia, Koerber Supply Chain SG Pte. Ltd

Louis Kok is the Head of Marketing & Sales for Körber Supply Chain SG Pte Ltd (Singapore), bringing over 25 years of experience in sales, business development, and strategic account management across the logistics, automation, and industrial-manufacturing sectors.

Since assuming his current role in 2017, Louis has been instrumental in expanding Körber's presence in Southeast Asia, forging key partnerships and driving growth for the company's end-to-end supply-chain and automation solutions.

Prior to Körber, he held leadership and sales roles at companies including Dematic, Brady Corporation Asia, and Panasonic Industrial Asia—consistently delivering results through customer-centric strategies and a "never-say-die" attitude.

Today, Louis leads a regional team to help businesses optimise their automation, digitalisation and supply chain transformation—championing innovation in a landscape of rising complexity and demand across Asia-Pacific.



Why Building Strong Supply Chains is Crucial for Malaysian Businesses

Mei Lin Yap, General Manager**, UPS Malaysia**

In the past, supply chains rarely entered public conversation. Today, however, they have become a central topic of discussion—and with good reason. Over the last decade, businesses worldwide have navigated an extraordinary series of disruptions.

From the far-reaching effect of the pandemic to the unpredictability of geopolitical tensions, these challenges have exposed the vulnerabilities of even the largest and most established organisations. Yet disruption also creates opportunity.

One of the clearest lessons is that building a resilient supply chain is no longer an option; it will almost certainly make all the difference for the future of a business. And companies that can build resilient supply chains will be best positioned to deal with whatever disruption lies ahead.

SO WHAT EXACTLY IS A RESILIENT SUPPLY CHAIN?

Supply chain resilience isn't just about reacting to problems. It means planning ahead, being flexible, having backup options, and using technology to keep things running smoothly. Malaysian businesses that build resilient supply chains will not only protect themselves from future shocks but also be ready to grow and adapt as markets change.

At UPS, we recently worked with the National Center for Asia Pacific Economic Cooperation (NCAPEC) on a report that examines the state of supply chains within APEC countries.

That report shows that a resilient supply chain is one that can easily adapt, rebound, or recover when faced with the kind of shocks we've experienced over the last few years. Worryingly, it seems most companies have yet to realise this. Our research shows that in key areas of diversifying products, suppliers, customers, and transportation options, up to 89% of businesses in Asia Pacific are still not resilient.

The report says that the resilience of a supply chain can be measured across five key dimensions:

- **Flexibility:** Your supply chain needs to bend, not break. This means having the agility to adapt to sudden shifts in demand, supply, or unforeseen events. Businesses should





build in options for alternate sourcing, dynamic rerouting, and varied delivery methods to maintain continuity.

- **Visibility:** You cannot manage what you cannot see. Comprehensive, real-time visibility across your entire supply chain—from raw materials to final delivery—is crucial for faster responses to disruptions. This allows businesses to monitor inventory, anticipate issues, and make strategic, informed decisions. Platforms, such as UPS Supply Chain Symphony, can provide this unified, cloud-based visibility across shipping, warehousing, and inventory management.

- **Connectivity:** A truly resilient network is deeply connected, enabling seamless movement of goods and information. Businesses should seek diversified transportation options—be it air, ground, ocean, or rail transportation—to ensure smooth transitions across different modes and geographies.

- **Robustness:** This is about building strength into your operations. It involves continuously investing in digital technologies, process innovation, and robust infrastructure that can withstand and adapt to shocks.

- **Redundancy:** Always have a backup plan. While efficiency is key, strategic redundancy—like multiple suppliers, diverse manufacturing sites, or excess capacity—ensures operational continuity when primary channels are disrupted.

By focusing on these five pillars and leveraging partners who are invested in these areas, businesses can transform disruption into opportunity and build truly resilient supply chains for success.

AND WHAT ABOUT MALAYSIA?

In the Malaysian context, important manufacturing sectors like Penang and Johor have faced many of the same challenges as other industries in other countries around the world. These disruptions have pushed businesses to rethink how they manage their supply chains. Penang and Johor play a crucial role in Malaysia's economy. To support this, UPS recently launched a new service in Senai that means imports and exports to and from Johor to countries across Asia Pacific can now enjoy next-day delivery, while imports and exports to and from Europe and the U.S. will arrive in as little as two business days.

Our new Johor service also allows businesses to tap into the benefits provided by the Johor Singapore Special Economic Zone (JS-SEZ). Officially inaugurated in January 2025, the JS-SEZ was designed to enhance economic cooperation between Johor and Singapore, facilitate the movement of people and goods, upskill and develop future generations of talent, and make doing business easier across the border.

Similarly, in October 2025, we will be opening a new, advanced logistics centre in Penang Science Park. This will provide businesses in the local area more flexible service options and better connectivity to UPS's world-leading global logistics network, helping boost supply chain resilience for companies in northern Malaysia.

GLOBAL TRADE IS CHANGING

Whether you've heard it referred to as nearshoring, diversification, China Plus or something else, the fact is many companies are

reviewing their business model and supply chain in order to become more resilient and protect themselves against future disruption. This includes exploring alternative bases for manufacturing, shortening the distances between production and consumption, and moving from the old just-in-time model to the new just-in-case model.

Businesses are adopting multi-sourcing and multi-location strategies to mitigate risks associated with over-reliance on a single point of production. No one wants to be in a situation again where, if plan A fails, we're all scrambling around trying to find the keys to plan B.

As businesses look to weigh up their options, many ASEAN countries are well positioned to capture opportunities presented by these trade lane shifts. As such, they should be considered when it comes to the China Plus 1 model. For example, Malaysia can compete well on the cost of labor and now even better via improved access to the global UPS network.

HOW UPS CAN HELP

UPS offers a range of solutions designed to help our customers strengthen supply chain resilience, capitalise on trade lane shift opportunities, and reduce operational risk, such as:

- **End-to-end global network:** A smart, multimodal logistics network that serves more than 200 countries and territories worldwide; an airline that operates a fleet of over 570 aircraft; the world's largest customs broker
- **Supply chain optimisation:** From inventory and network planning to warehouse automation and transport mode selection, we help businesses identify efficiencies that deliver long-term savings.
- **Smart visibility tools:** Solutions like Intelligent Asset Tracking provide 24/7 monitoring of location, temperature, and humidity, crucial for industries like pharma and electronics.
- **Better experience (for our customers and yours):** End-to-end visibility solutions that allow you to track every link in your supply chain in real time; AI-powered APIs that show online shoppers exactly how much they'll be paying before they click 'Buy'; and customizable delivery options that put control back in the hands of your customers.

SO WHAT NOW?

International trade is complicated, and there is no single right answer or one-size-fits-all solution to every problem. Every company is different, and the solution that works best for you depends on a number of factors—including the nature of your business, what you ship, where you ship to, and your future aspirations. But there are things that every company should be doing, and that begins with taking a close look at your supply chain, identifying any weaknesses, and patching them up. Movements such as the JS-SEZ and other trade agreements are one ideal ingredient of a resilient supply chain and a great place to start.

If you'd like to find out more, scan the QR code and join us for a free consultation where we can begin to look at what options are available to you.



Mei Lin Yap
General Manager, UPS Malaysia

Yap Mei Lin is the General Manager of UPS Malaysia, responsible for the strategic management of UPS's small package business across operations, marketing, business development, brokerage, finance, accounting, and security. She joined UPS in 2014 as a finance manager, playing a key role in revenue growth, cost control, and compliance.

Mei Lin successfully led the implementation of the goods and services tax (GST) into UPS's systems in 2015, coordinated efforts to secure a new customs agent license, and implemented a cashless QR code solution for cash-on-delivery shipments to enhance service reliability and customer experience.

MOVING OUR WORLD FORWARD BY DELIVERING WHAT MATTERS



Book a free 15-minute consultation to discover new opportunities, strengthen your supply chain and more.

Let our logistic experts help ignite ideas to advance your business!



Maersk reports strong Q3 2025 results: EBITDA at USD 2.7bn, EBIT at USD 1.3bn amid operational gains

Copenhagen, Denmark – A.P. Moller - Maersk A/S (OMX: MAERSK-B) delivered strong financial results in the third quarter of 2025, driven by operational improvements and proactive cost measures. The company achieved sequential growth across all business segments. Based on this, Maersk refines the full-year 2025 financial guidance.

EXECUTIVE SUMMARY

- Excellent ocean performance with higher volumes and broadly stable loaded freight rates compared to Q2.
- Record volumes and profitability in terminals.
- Continued margin improvement in Logistics & Services.
- Distribution of cash to shareholders during the quarter was USD 578m, entirely from share buybacks.
- Maersk refines the full-year 2025 financial guidance by raising the lower end as per the table below.
- The expected global container market volume growth has also been revised to be around 4% (previously between 2% and 4%).
- REVENUE: USD 14.2bn (USD 15.8bn in Q3 24), EBITDA: USD 2.7bn (USD 4.8bn), EBIT: USD 1.3bn (USD 3.3bn).

Maersk's CEO Vincent Clerc stated, "We have delivered a strong third quarter across our business. Our performance reflects our ability to execute and continuously improve, as well as the trust customers place in us. The new East-West network has strengthened our Ocean performance, delivering industry-leading reliability, higher volumes, and lower costs. Terminals achieved another record quarter with strong volume growth, and Logistics & Services continued to enhance profitability. As market conditions fluctuate, we are well positioned to help our customers adapt and maintain stability across their supply chains."

SEGMENT PERFORMANCE

OCEAN

- The Gemini Cooperation enabled significant cost

Guidance 2025	EBITDA Underlying (6 February: 6.0-9.0) (7 August: 8.0-9.5)	EBIT Underlying (6 February: 0.0-3.0) (7 August: 2.0-3.5)	Free cash flow or higher (6 February: -3.0 or higher) (7 August: -1.0 or higher)	CAPEX 2024-2025 (6 February: 10.0-11.0) (7 August: Unchanged)	CAPEX 2025-2026 (Unchanged)
USDbn	9.0-9.5	3.0-3.5	1.0	~10.0	10.0-11.0

Figure 1
Financial Guidance

Factors	Change	Effect on EBIT (Rest of 2025)
Container freight rate	+/- 100 USD/FFE	+/- USD 0.3bn
Container freight volume	+/- 100,000 FFE	+/- USD 0.01bn
Bunker price (net of expected BAF coverage)	+/- 100 USD/tonne	+/- USD 0.1bn
Foreign exchange rate (net of hedges)	+/- 10% change in USD	+/- USD 0.0bn

Figure 2
The Sensitivities for 2025 for Four Key Assumptions

savings and supported 7% loaded volumes growth year-on-year; freight rates were broadly stable quarter-on-quarter.

- EBIT: USD 567m, up from USD 229m in the previous quarter. Was USD 2.8bn in Q3 24.

LOGISTICS & SERVICES

- Profitability improved further to 5.5% (up from 4.8% in the previous quarter) driven by cost control and the performance in Fulfilled by Maersk, particularly in Warehousing.

- EBIT: USD 218m, up from USD 175m in the previous quarter. Was USD 200m in Q3 24.

TERMINALS

- Momentum continued with record-high volumes, revenue, EBITDA, and EBIT;

- Volumes grew 8.7% driven by strong demand across Americas, Europe, and Africa; high utilisation at 89% with some terminals nearing their full potential

- EBIT: USD 571m, up from USD 461m in the previous quarter. Was USD 338m in Q3 24

FINANCIAL GUIDANCE

Maersk refines the full-year 2025 financial guidance by raising the lower end as per the table in *Figure 1*. The expected global container market volume growth has also been revised to be around 4% (previously between 2% and 4%). The Red Sea disruption is expected to last for the full year.

SENSITIVITY GUIDANCE

Financial performance for Maersk for 2025 depends on several factors subject to uncertainties related to the given uncertain macroeconomic conditions, bunker fuel prices, and freight rates. All else being equal, the sensitivities for 2025 for four key assumptions are listed in *Figure 2*.



MAERSK

ABOUT MAERSK

Maersk is an integrated logistics company working to connect and simplify its customers' supply chains. As a global leader in logistics services, the company operates in more than 130 countries and employs around 100,000 people. Maersk is aiming to reach net zero GHG emissions by 2040 across the entire business with new technologies, new vessels, and reduced GHG emissions fuels.*

**Maersk defines "reduced GHG emissions fuels" as fuels with at least 65% reductions in GHG emissions on a lifecycle basis compared to fossil of 94 g CO2e/MJ.*



Rethinking Asia's Supply Chains

Building practical resilience for the next decade

By **Badrinath Setlur**, CEO – **Pando.ai, TMS Business**

If there's one thing the last decade has made painfully clear, it is this: complexity is not a theoretical risk anymore; it is a line item on every company's P&L, and that is where Asia's advantage lies. This region is building the most adaptive supply chains in the world because it had to. Fragmented networks, variable infrastructure, and fast-moving markets force companies here to build resilience by design.

At Pando, we see this shift every day. Our work sits at the intersection of how goods move and how money flows: connecting trade, procurement, and payments on one intelligent network. The goal is not visibility for its own sake; it is to help enterprises decide faster, pay smarter, and plan with confidence.

FROM EFFICIENCY TO INTELLIGENCE

For years, we celebrated efficiency; getting leaner, faster, cheaper. But efficiency, as it turns out, has limits. It works beautifully when the world behaves as expected. But the moment it does not, those same efficient systems start to crumble. That is the reality we saw across every large enterprise we worked with. Great teams and world-class operations but stitched together by too many disconnected systems. Freight moved one platform, procurement in another, and finance somewhere else entirely. Each team runs at full speed, but not always in the same direction.

We have seen it firsthand. A leading FMCG company we work with ran freight procurement the traditional way: a handful of preferred carriers, static contracts, and spreadsheets that told half the story. Within months of moving to Pando's network, they unlocked new lanes, discovered carriers they had never worked with, and could see cost and performance in the same view.

Savings followed, but that was not the win. The win was confidence, the ability to plan freight and spend with the same data in real time.

That is what intelligence really looks like in practice. Not more dashboards or data dumps; just better decisions, made



faster, because everything finally talks to each other.

VISIBILITY BEYOND TRACKING

Visibility is an overused word. Most companies do not need to "see" more; they need to understand what they are looking at. Take a global lubricant manufacturer with hundreds of suppliers and logistics partners. Before For Pando, visibility meant endless updates: trucks in transit, ETAs, and spreadsheets.

After connecting their freight and finance data, visibility meant something else entirely: one live network showing what is moving, what is delayed, and what is due for payment. When operations, procurement, and finance share the same truth, everything changes. Routes get optimized automatically. Freight bills reconcile in hours, not weeks. Suppliers get paid when milestones are verified, not when someone remembers to approve an invoice. That is the kind of visibility enterprises actually need: actionable, not decorative.

LIQUIDITY IN MOTION

One of the biggest drags in any supply chain is not movement; it is money. Freight moves fast. Finance does not.

In one European retail network we work with, billions in freight spend used to sit locked in reconciliation cycles. After moving to a connected platform, every delivery milestone became a financial event. Proof of delivery triggered payment or early financing automatically. That liquidity did not just improve cash velocity. It built trust. When suppliers know they will get paid as soon as they deliver, the entire ecosystem moves faster. That is what we mean when we say we connect freight and finance. It is not just integration, it is alignment. Today, that network manages over $300 million in freight spend on a connected platform: every shipment is tracked, billed, and reconciled automatically. Tens of thousands of weekly trips now move without manual intervention, and audit accuracy now sits at 100%. Payments that once took weeks now to sync with delivery milestones.



DESIGNING FOR ASIA'S DIVERSITY AND ITS DATA DENSITY

No two markets in Asia look the same. Each country brings its own infrastructure maturity, customs rules, and digital realities. But what unites the best-performing enterprises is how they combine central control with local intelligence. Singapore often acts as the command center, orchestrating governance, analytics, and compliance while execution happens closer to the market in Indonesia, Vietnam, or India.

That is where AI makes the biggest difference. It gives context to complexity. It helps enterprises operate confidently in diversity, turning thousands of daily transactions into insights that drive action. Our region's diversity is not a problem to solve; it is a dataset to learn from.

THE LEADERSHIP IMPERATIVE

Every conversation I have with logistics and procurement leaders sounds similar: "We've digitized everything, but we



still don't see enough." That is where the next leap lies: in connecting visibility, foresight, and liquidity into on intelligent flow. Across Asia, enterprises are already doing it: linking freight, procurement, and finance into a living, learning network that adapts in real time. They're using AI-driven insights built from their own operational context to anticipate demand spikes, reroute capacity, and release cash when milestones are hit.

This is not a boardroom vision. It is happening on the ground. And it is making Asia the proving ground for the world's most adaptive supply chains.

At Pando, we have learned that change does not start with technology, it starts with getting the basics right.

When a planner closes a shipment without a single call, when a CFO sees the numbers before month-end, when a supplier gets paid on time because the data lined up.

That's what intelligence really looks like.

It is not futuristic; it is practical. And it is already here.



Mr. Badrinath Setlur

CEO, Pando.A.I, TMS Business

Badrinath Setlur is a seasoned leader in the supply chain and logistics technology sector, currently serving as the CEO of the TMS Business and India Business at Pando AI. In this capacity, he spearheads the company's efforts to unify logistics data and processes, driving operational efficiency through an AI-first Transportation Management System.

With a strong background in industrial engineering, Setlur is an industry veteran celebrated for leading significant digital transformations. His extensive career includes pivotal leadership roles at Cognizant and IBM Global Business Services, where he directed consulting practices in manufacturing and supply chain management. He also gained valuable experience at firms like KPMG and i2.

Setlur is a recognized thought leader focused on the convergence of digital technology and supply chain resilience. His expertise spans connected shipping, predictive analytics for superior asset management, and developing roadmaps for resilient green supply chains. He is committed to helping businesses leverage technology to reduce costs, improve performance, and accelerate time-to-value in complex global supply networks.



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