LogiSYM

BUMPER ISSUE

The Magazine for Supply Chain Executives

DECEMBER 2025

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SUPPLY CHAIN OUTLOOK 2026: A YEAR OF TRANSITION AND TRANSFORMATION

BUILDING RESILIENCE IN HEALTHCARE SUPPLY CHAINS: A CONVERSATION WITH CARDINAL HEALTH'S BENJAMIN BRINKER

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The Logistics & Supply Chain Management Society
The Regional Professional Body for Logistics Practicioners

The Official Journal of The Logistics & Supply Chain Management Society

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Building Resilience in Healthcare Supply Chains: A Conversation with Cardinal Health's Benjamin Brinker

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EDITORIAL MESSAGE

From the Editor

Welcome to the December 2025/January 2026 edition of LogiSYM Magazine where we will both reflect on 2025 and consider what awaits us in the exciting world of Supply Chain and Logistics in 2026. This is a "Bumper Issue" which leads with a with conversation on "Building Resilience in Healthcare Supply Chains" with Benjamin Brinker, President of Global Operations and Supply Chain at Cardinal Health.

For 2026, we are excited to include a very special "Supply Chain Outlooks 2026" segment with contributions from a diversity of Global Supply Chain Leaders to whom we are extremely thankful for the deep insights they shared, including Ruth Banomyong, Philip Evans, Yann de Ferraudy, Sheri R. Hinish, Scott Luton, Omera Khan, Wolfgang Lehmacher, Mark Millar, Peter Sand, Dr.Albert Tan, Marco Tieman, Peter Tirschwell and Kim Winter.

We also review the outcomes of the recent COP 30 in Brazil, with Wolfgang Lehmacher and Mikael Lind article, "Reality Check – What Belém's COP30 Means for Global Freight". And our final Green Corridor segment for the year from Tim Foote looks at "2026 - The Green Transition Picks Up Speed".

With my own reflections on 2025, global supply chains are closing the year more resilient—not because complexity has eased, but because leading firms are finally treating risk management and "anti-fragility" (Nassim Nicholas Taleb) as something to be designed, not endured. Networks are being recast as portfolios of options: diversified sourcing, dual routing, and scenario-led planning built on real-time data, AI-enabled execution, and tighter partner governance. The real shift is cultural as much as technical, with uncertainty now written into the brief rather than framed as an unwelcome shock.

Across Asia, that story does not play out evenly. ASEAN's promise is real, but it actualizes only where companies accept administrative and regulatory complexity as a permanent feature of the landscape. Fragmented rules, variable customs practice, and uneven enforcement still define the region; successful companies respond with compliance-by-design, trusted local partners (not just service providers), and country-specific operating models instead of a generic "ASEAN strategy." Vietnam, Thailand, Malaysia, and Indonesia now anchor distinct roles in multi-hub production networks, turning institutional friction into a risk that can be managed – and priced.

A big thank you to our contributing authors for the time they have taken to create the industry insights they share with over the past year, to our subscribers for their readership, and to the LogSYM Editorial Team for their wonderful support in publishing this Magazine!

Brett Marshall
Editor-In-Chief
LogiSYM Magazine



LSCMS PRESIDENT'S MESSAGE

In the Eye of the Storm

As we stand at the threshold of 2026, it is worth reflecting on a year that redefined leadership in our industry. 2025 was a year of convergence for **LogiSYM** and **CargoNOW**, where we moved beyond discussing resilience to actively engineering it. From our flagship Asia Pacific summit to our regional symposiums, we have supported a profession navigating a complex geopolitical landscape where senior experience is the critical differentiator.

2025 in Retrospect

The past year was defined by a pragmatic obsession with ROI and operational efficiency. We saw the Singaporean market, a global logistics hub, demand higher standards of verification and state-recognised excellence and the messages and experience in the region was no less similar where they only differed in specific approach and focus. Supply chain leaders grappled with rising labour costs and a "visibility gap" in end-to-end data, requiring a pivot toward strategic roadmaps rather than reactive measures.

Looking Ahead to 2026: Plans and Pitfalls

As we look to the coming year, our focus remains on Work-Integrated Value Creation. The opportunities lie in digital transformation with the use of Artificial Intelligence and the integration of deep-dive analytics into our strategic playbooks. However, supply chain leaders must be wary of two primary pitfalls:

- **The Attrition Risk:** Overwhelming operational workloads can lead to burnout if not supported by structured, achievable milestones.
- **The Trust Gap:** In an era of generic solutions espousing quick fixes and breakthroughs, the need for industry-endorsed leadership and strategic roadmaps has never been higher.

At the end of the day, despite the hullabaloo and noise around AI, people make or break successful Supply Chains. In 2026, LogiSYM will continue to champion the experienced leader alongside our focus on technology and sustainability for resilient and accountable global trade. Our goal is to ensure that Supply Chain leadership serves as the definitive cornerstone for resilient and agile Supply Chains.

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



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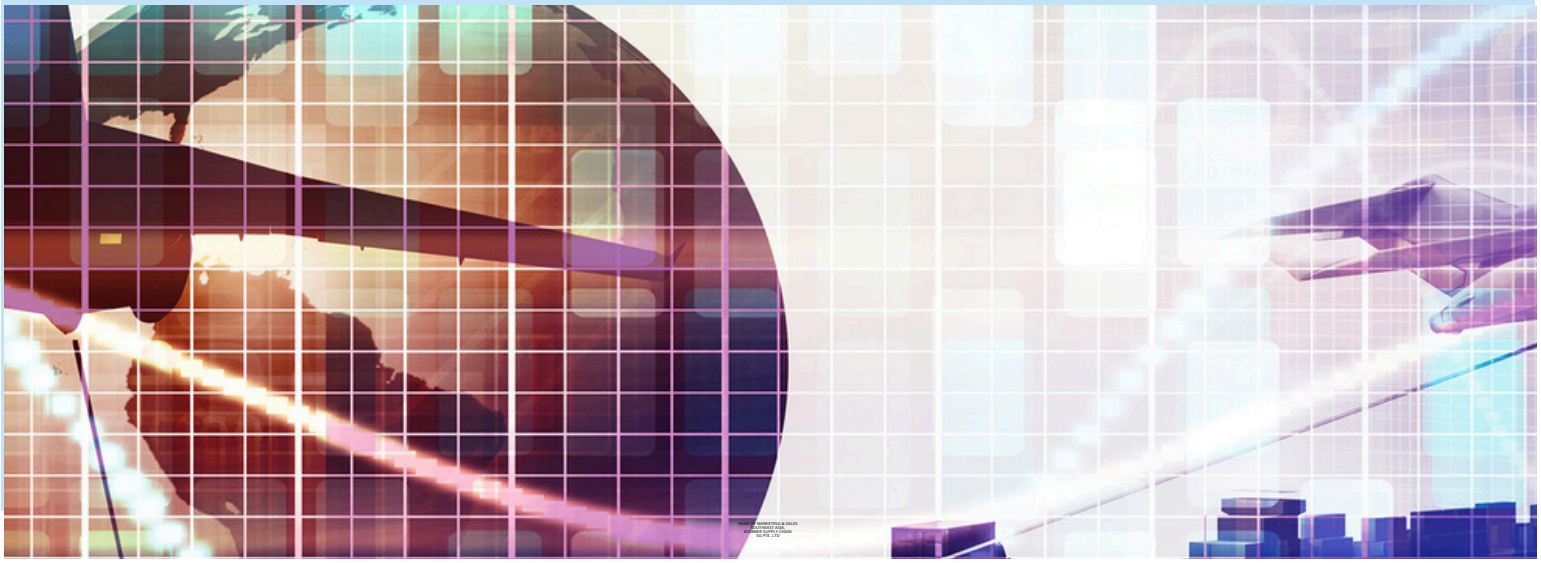
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SUPPLY CHAIN OUTLOOK 2026

A Year of Transition and Transformation

Industry Insights from Global Supply Chain Leaders

The Future of Logistics and Supply Chains in Asia, 2026

By Dr. Albert Tan Associate Professor Malaysia Institute for Supply Chain Innovation

As 2026 approaches, Asia's logistics and supply chains are being reshaped by artificial intelligence (AI), digital integration, and the urgent push for sustainability. With Asia accounting for over 60% of global manufacturing output, the region's competitiveness will increasingly hinge on how effectively firms harness AI to enhance resilience and efficiency.

AI-driven predictive analytics will become the backbone of supply chain management—forecasting demand fluctuations, identifying bottlenecks, and optimizing multimodal transport routes in real time. In China, Japan, and South Korea, AI-powered smart ports and autonomous vehicles are already reducing dwell times and improving cargo throughput.

Southeast Asian economies such as Singapore, China, and South Korea are deploying AI-based warehouse management systems and robotic picking solutions to counter labor shortages and meet e-commerce surges. These technologies will transform logistics from reactive to anticipatory systems.

AI will also drive sustainability goals. Through carbon data modeling and route optimization, companies can minimize emissions while maintaining service reliability. Predictive maintenance powered by AI will extend the lifespan of logistics assets, while digital twins will allow simulation of entire supply chains to test resilience under disruption scenarios.

However, the uneven pace of AI adoption—due to infrastructure gaps, data silos, and limited digital skills in developing economies—remains a major regional challenge. To stay competitive, Asian firms must invest in AI literacy, cross-border data standards, and collaborative innovation ecosystems linking tech firms, manufacturers, and logistics providers.

Governments can catalyze progress through AI governance frameworks and funding for green digital infrastructure. In short, by 2026, Asia's most competitive supply chains will be those that integrate AI not as a tool for automation alone, but as a strategic engine for sustainability, agility, and long-term growth.



Dr. Albert Tan

Associate Professor
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Dr. Albert Tan is currently an Adjunct professor in MISI and Director at Shanghai Jia Tong University. Prior to that, he was an Associate Director managing the Master program in Supply Chain Management and Logistics Management. His research works have been published in international journals and is an editorial board member for various international journals.
Albert was previously a Director working in a government agency responsible for upgrading the IT capability of the manufacturing and logistics industries. This involved planning and evaluating e-Commerce solutions for the chemical and logistics industries.

Logistics & Supply Chain Outlook 2026: What Will Define the Landscape and How Businesses Must Prepare

By Kim Winter, Founder & Group Managing Director Logistics Executive

The logistics and supply-chain sector is heading into 2026 with a structural shift that's impossible to ignore. Market volatility is no longer episodic; it has become the operating rhythm. Businesses that cling to legacy models will find themselves outpaced by those embracing smarter, faster, tech-enabled execution.

Three developments will define the year: First, capacity realignment across air, ocean, and last-mile will accelerate as carriers rebalance networks around profitability, regionalisation, and nearshoring. Expect tighter space, more dynamic pricing, and an intensified focus on contractual discipline. Second, digital orchestration will finally become mainstream, with AI-driven forecasting, automated quoting, and real-time inventory visibility shifting from "nice to have" to baseline capability.

Third, sustainability will move from compliance to competitive advantage, with emissions-focused procurement, urban-delivery regulations, and green-premium products reshaping cost structures and customer expectations. Challenges will be equally pronounced. Talent shortages in critical nodes, rising variable costs, geopolitical fragmentation, and cybersecurity threats will squeeze margins and expose operational weak spots. Meanwhile, customer expectations will continue to climb demanding precision, transparency, and speed without tolerance for excuses. To stay competitive, businesses need to rethink resilience as a strategic capability rather than an emergency response.

This means rewiring networks around data, not intuition; digitising commercial and operational workflows end-to-end; and diversifying suppliers, partners, and trade lanes. Organisations must also invest in advanced revenue-management disciplines, more agile capacity planning, and scenario-based playbooks that allow for rapid course correction.

Finally, leaders should double down on talent: building cross-functional skill sets, developing commercial and analytical acumen, and empowering teams with tools that elevate decision-making at the frontline.

2026 will reward the organisations that combine discipline with innovation those prepared to operate with clarity, speed, and a future-focused mindset. The winners will be the businesses that shift from reacting to shaping the new logistics landscape.



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.

The Future of Logistics and Supply Chains in Asia, 2026

By Omera Khan, Chief of Staff, Strategy & ESG Lead

Looking ahead to 2026, two forces will shape the supply chain landscape more than any others: the rapid maturation of AI and the acceleration of regionalisation.
AI is moving swiftly beyond its role as an insights engine to become an orchestrator of end-to-end decision-making. As adoption rises, it will fundamentally transform how supply chains are planned, optimised, and executed. At the same time, persistent volatility is prompting companies to redesign networks with resilience at the core.

This is driving more regionalisation as firms diversify suppliers, relocate production closer to demand, and invest in energy resilience to buffer against shocks.
To prepare, organisations must take a deliberate and disciplined approach. With AI, the starting point is a clear articulation of business need. AI should enhance core capabilities, not serve as a stand-alone solution in search of a problem.

Once the use case is defined, success hinges on high-quality data, robust integration, and real-time visibility. Investments in IoT, digital twins, and supply chain control towers will be essential enablers. For example, DHL Supply Chain is already leveraging AI-driven control towers to enhance real-time visibility and decision-making across its global operations. These systems integrate IoT data from warehouses and transport networks, allowing proactive intervention when disruptions occur — a key step toward truly autonomous logistics networks. Equally important is capability building: teams must understand how to interpret, challenge, and operationalise AI-driven insights.

On the regionalisation front, leaders should reassess network design with a focus on reducing single-source dependencies. This may include nearshoring critical production (as seen in the semiconductor and EV battery sectors), dual sourcing to reduce dependency on single suppliers, or investing in energy resilience through renewable generation or partnerships with stable grid providers.

For instance, BMW has expanded EV battery production closer to its European and U.S. assembly plants, while Foxconn and other manufacturers are diversifying beyond China into Vietnam, India, and Mexico to reduce geopolitical exposure. Effective resilience will increasingly be measured not only by how well organisations absorb disruptions but by how quickly—and intelligently—they recover from them. Strengthening sensing mechanisms, response protocols, and recovery playbooks will be key. For inspiration and guidance “the signal house” provides a novel and how to implement resilience in your organisations now.

Ultimately, preparing for AI and regionalisation does not require abandoning globalisation. It requires building agile, data-driven, and risk-balanced supply chains that leverage the best of both global and regional strengths. Organisations that integrate these capabilities holistically will be well-positioned to compete—and thrive—in 2026 and beyond.



Omera Khan

**Chief of Staff,
Strategy & ESG Lead**

Omera Khan, PhD is a globally recognized leader, educator, and strategist in logistics and supply chain management. With over 20 years of international experience spanning academia, industry, and executive advisory, she is known for her visionary leadership, deep expertise in supply chain risk and resilience, and her ability to drive strategic transformation across complex global operations.

An interconnected world, global supply chains and the human touch

Philip Evans, Secretary General, The European Freight & Logistics Leaders' Forum (F&L)

At one point in 2025 we could lie back, press a button and let the global supply chain oil the wheels of global trade. No hitches, no delays, just optimised reactions to every twist and turn in geopolitics, environmental disasters, or Trump pronouncement on Truth Social. It did not matter because technology, and AI in particular, would provide the answer and that was great except we were all out of a job! Whilst at F&L we have seen many job changes amongst our Membership, these are driven more by personal circumstances or changes in strategic direction, than obsolescence!

Well, it has not happened and will not happen for a long time.Sure, the technology is coming, and it will be useful but for 2026, you will still need great people and great partners. These two critical assets will still make or break supply chain actors in 2026 and beyond.Technological developments just change the starting position.

For example, ask yourself this question: If major supply chain and freight volumes are dominated by major players (so called E2E carriers) where does my business fit in? Historically a good contact book and credibility was sufficient, but the AI agent doesn't have such bias and knows everyone. Each business has to add value; each business must, in effect, have a "licence to operate". What's more that licence has to be constantly renewed.

We are now seeing the challenge to logistics teams with operational knowledge and contacts supplemented by technological solutions; maybe to be replaced by AI and its successors, but not yet. The problem is that in the transition phase senior executives are investing with limited return on investment and, against a backdrop of sluggish global customer demand, competitive pressures in Europe, inflation, there is pressure to cut costs. Cutting out critical operational knowledge and access to collaborative partners invites delays, cost overruns and supply chain dislocation.

My impression is that Europe lags Asia and North America for upskilling and is caught between demand constraints and national inconsistencies across its borders. Draghi's competitiveness report and has been vocally supported by all but acting on its recommendations is slow. F&L conducted a series of online discussions with our global partners, including LogiSYM, entitled "Trading Blocs – strategies for freight logistics professionals to manage the volatile global trading environment".

There is some increased stockholding, and dual sourcing - but consistently operational experts from around the world still rely on their capability and skills to navigate a turbulent environment.Crucially they rely on their partners to work with them come rain or shine.

Critical skills will include the ability to access and assess non price KPIs, service level variables and trustworthiness.Collaboration is not just a choice in global freight logistics but a necessity. Even the E2E behemoths will need reliable partners to complete the journey.

At what point do we stop assessing global trading alliances by geography, culture and time zones and start viewing our roles through the lens of comparative skills, collaborative capabilities, trustworthiness and added value to our chosen global supply chains? Then we might have a licence to operate with AI and beyond.



Philip Evans

Secretary General, The European Freight & Logistics Leaders' Forum (F&L)

Philip Evans is a commercial and strategic leader with multi-sector and international experience. He specializes in international B2B development and the food & drink export market, and now leads the F&L Forum as Secretary General while supporting businesses with global growth and supply-chain efficiency.

Supply Chains in 2026: Stop Optimizing a Broken System and Build for Regeneration

By Sheri R. Hinish, Founder - Supply Chain Queen, Supply Chain Revolution

As we enter 2026, global logistics is standing at a crossroads. We can continue refining a system built for an earlier industrial era, or we can redesign value chains to become intelligent, equitable, and regenerative. The must dos for leaders are clear.

First, deploy AI as planetary intelligence, not as a cost cutter. The new frontier is agentic AI linked to trusted data that can sense change, learn continuously, and guide action in real time. This is how logistics networks will predict extreme weather, anticipate supply constraints, and orchestrate circular flows across borders. AI becomes the architecture that connects enterprise decisions with planetary realities.

Second, design for antifragility, not survival. The most advanced networks in 2026 are adaptive networks that strengthen under stress. They use digital twins, scenario simulation, and ecosystem data to learn from every disruption. Antifragile supply chains do not bounce back. They evolve. Third, integrate circularity and regeneration as the operating model. Compliance is no longer the point. Whether it is food systems, critical minerals, or consumer goods, The expectation is that products, materials, and carbon flows move in loops. Reverse logistics, reuse, and repair are core capabilities, not sustainability projects.

Fourth, build transparency as trust infrastructure. Ports, carriers, producers, and regulators need shared visibility. Verification, traceability, and interoperable data platforms are now essential for market access and climate aligned finance.

Finally, expand the definition of resilience to include society. The most significant risks begin at the design table. Leaders must evaluate how choices impact communities, ecosystems, and geopolitical stability. This is where true competitive advantage begins. Supply chain and logistics professionals are now the architects of a regenerative global economy. 2026 rewards those who build systems that serve both business and the planet.





Sheri R. Hinish

Founder - Supply Chain Queen, Supply Chain Revolution

Sheri R. Hinish is a global executive, strategist, and creator working at the intersection of sustainability, AI, supply chain, and innovation. Widely known as the "Supply Chain Queen," she advises Fortune 500 companies, governments, and non-profits on sustainability strategy, advanced technology scaling, and ecosystem development to deliver measurable, long-term value.

Most recently, she served as Global Consulting Leader for Sustainability Solutions, Technology, and Ecosystems at EY, where she led and scaled global solutions spanning decarbonization, ESG data, AI, digital infrastructure, and sustainable supply chain transformation. She also built and led global alliances and investments across sustainability technology and ventures, serving clients across energy, private equity, financial services, industrials, CPG, and manufacturing.

An interconnected world, global supply chains and the human touch

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

The operating environment in 2026 will mirror that of 2025. Logistics and supply chains will face ongoing disruptions, regulatory shifts, and high customer expectations. Despite continued investment in technology and strategic agility, volatility and complexity will remain a challenge.

Companies need visibility and AI-driven adaptability to detect and respond to sudden shocks. Holistic risk analysis is essential to avoid shifting risks rather than addressing them for more accurate scenario planning. Postponing commitments, whether in production or fulfilment, enhances responsiveness. Keeping processes flexible allows businesses to meet demand and adapt to surprises. Intelligent digital twins, along with scenario plans, playbooks, and real-time, multi-tier mapping, support this agility by dynamically simulating outcomes and guiding response strategies.

Digitalization and automation are now baseline requirements for competition. But differentiation will depend on how firms manage exceptions and disruptions. Personalized service, empowered people throughout the supply chain, and rapid, informed decision-making are crucial, especially at the frontline. Companies should cultivate a culture where ethics and trust are embedded so deeply that minimal rules are needed.

The days when flagship agreements or public declarations set corporate benchmarks are finished. It is national capitals, not UN lobbies, where the action unfolds. Yet, because shipping is inherently global, the IMO must be strengthened.

Supply chains should refocus advocacy and compliance to the local level, blending policy intelligence with commercial pragmatism, and build internal coalitions that marry sustainability expertise with procurement and government relations. Policy-aware supply chains are vital.

Ecosystem orchestration goes beyond sharing data and building trust. Agile exception handling, alerts, and real-time stakeholder syncing are essentials. Supply chain strategy should be a continuous process at the board level. Combining digital infrastructure—including intelligent digital twins—human oversight, empowered talent, and ongoing learning ensures responsiveness and results. In 2026, every disruption should spark new capabilities and a competitive advantage. Some would call such a capability antifragile.



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. He is a member of the Dynex Ethical Committee, contributes to the knowledge base of Maritime Informatics, and is co-editor of the book Maritime Decarbonization.

Logistics and Supply Chain Trends for 2026

By Yann de Feraudy, President France Supply Chain Association

As 2026 approaches, supply chains continue to evolve amid uncertainty on tariffs, wars, digital acceleration, and more frequent destructive climate events, and yet, it is time to think about key trends that could define the supply chain landscape next year.

A forest that grows makes less noise than the falling tree
Let us not be distracted by the surrounding noise about the AI revolution. By the time you read these lines, the AI bubble may have burst.

Nevertheless, the incredible computing power combined with Gen-AI models that can process terabytes of data in seconds has given birth to super powerful Digital Twins, enabling companies to conduct end-to-end Supply Chain scenario planning and real time optimization thus unveiling unprecedented agility and resilience.

TAKEAWAY #1: FOCUS ON TECHNOLOGY THAT WORKS TO BOOST YOUR PERFORMANCE.

Finally, the eTruck may find its path to scale in 2026. Spoiler: the eTruck TCO can now be more cost-competitive than traditional diesel. Thanks to technology that has pushed the autonomy of a loaded 44T to 600 km combined with AI-powered software that:

- Traces vehicles in real time;
- Gets their battery gauge;
- Projects their ETA while purchasing electricity at the best possible price during the time slot necessary to reload their batteries, given next departure times and power balancing required.

All it takes is the right ecosystem:

- A financer to lease the trucks;
- An infrastructure provider to deliver efficient and shared charging stations to optimize costs;
- A software solution that manages the complete cycles;
- An integrator that delivers and runs the global solution.

TAKEAWAY #2: IT IS ALL ABOUT PROCESS CHANGE!

Do not forget to ask Santa to bring your “Climate adaptation plan” you will need one to deliver short to medium-term resilience.
All the best for 2026.



Yann de Feraudy

President France Supply Chain Association

Yann de Feraudy is Chairman of the board of France Supply Chain, France’s largest association of Supply Chain professionals; he is also a Non-Executive Director on the board of the FM Logistic group.
Yann graduated from ESSEC, began his career at Danone, spent 10 years in consulting before spending 30 years in operational roles for Kuhne & Nagel and cosmetic company Rocher Group, where he was Deputy CEO for Procurement, Manufacturing Supply Chain and IT until mid-2023. Yann is a recognised expert in Supply Chains, their ESG challenges, and their impacts on company value creation.

2026: The Year Supply Chains Are Judged on Performance, Not Promises

Ruth Banomyong (PhD), Director, Center of Excellence in Connectivity, Thammasat University

As 2026 approaches, global supply chains are entering a more unforgiving phase. Volatility is no longer episodic, it is structural. For business leaders, the question is no longer how fast supply chains can move, but how reliably they can perform under pressure. Hereunder are my thoughts based on my research portfolio.

The first defining shift is a move from infrastructure-led connectivity to performance-led connectivity. Investments in ports, corridors, and digital platforms will deliver diminishing returns unless matched by improvements at borders, checkpoints, and institutional interfaces. In practice, delays, inconsistent procedures, and fragmented decision-making now represent some of the largest hidden costs in global trade.

In 2026, competitive firms will be those that actively measure and are able to manage corridor and border performance, rather than assuming infrastructure alone guarantees efficiency. The second issue is that sustainability will become an operating condition, not a branding exercise. Circularity, emissions reduction, and traceability are pushing deeply into core logistics decisions. Yet experience across Southeast Asia shows that circular supply chains fail when consumer behaviour, incentives, and reverse logistics capabilities are overlooked. CEOs will need to approach sustainability as a system redesign challenge by integrating forward and reverse flows, building credible data, and aligning partners rather than delegating it to compliance teams.

Last but not the least, logistics networks will increasingly intersect with energy and humanitarian systems. The rapid expansion of electric vehicles is already exposing gaps between demand and charging infrastructure, creating new risks for distribution reliability. At the same time, humanitarian and emergency supply chains are shifting toward cash-based and digitally enabled models, blurring the boundary between commercial logistics, finance, and public systems.

In order to stay resilient and competitive in 2026, supply chain executives will have focus on three priorities: (1) build visibility into real performance not just KPIs on paper; (2) design supply chains for disruption, sustainability, and transition; and (3) strengthen cross-border and cross-sector partnerships. The coming year will reward leaders who manage complexity proactively and punish those who rely on assumptions rather than evidence.



Ruth Banomyong

Director, Center of Excellence in Connectivity, Thammasat University

Ruth's main research interests are in the field of multimodal transport, international logistics, trade facilitation, logistics development policy and supply chain performance. He has published over 100 papers and reports in journals such as International Journal of Physical Distribution and Logistics Management, International Journal of Logistics Research and Application, Supply Chain Management: An International Journal, Asia Pacific Journal of Marketing and Logistics, Maritime Policy and Management, Asian Journal of Shipping and Logistics, Transport Policy, among others, and he has co-authored more than 10 books.

2026 Industry Outlook

By Mark Millar, International Keynote Speaker, Commissioned Author, Trusted Advisor and Supply Chain Thought Leader

We are on the cusp of an exciting new era for supply chain and logistics. The outlook for 2026 is both challenging and exhilarating. Ongoing uncertainty and volatility can only further turbo-charge the great supply chain reconfiguration that is already underway.

A host of external variables - including geopolitical tensions, digital disruption, climate change, economic nationalism, and of course artificial intelligence - will provide a smorgasbord of challenges and opportunities. Supply chain initiatives will need to embrace diversification, resilience and sustainability, with renewed focus on optimisation and durability, and maybe less emphasis on absolute lowest cost.

Priorities should include streamlining operations, reducing transportation costs, accelerating time-to-market and boosting customer satisfaction. In order to de-risk their global exposure, companies will seek to reconfigure their supply chain ecosystems to adopt a more regional approach, whereby production and sourcing are relocated closer to the final markets. Supply chains will therefore become more local and less global. The resulting regional supply chains will be shorter and more localised, enabling companies to benefit by reducing lead times, freight costs and emissions; whilst also increasing control, responsiveness and resilience. However, this will not result in a mass manufacturing exodus from China.

Much of the local production is now destined for the huge Chinese consumer market. Multi-national companies will therefore retain at least some of their manufacturing and sourcing operations within China, in order to serve the local domestic market. This is the 'In China for China' supply chain strategy.

Let's not forget, thirty years ago, the multi-national companies came to China for the Workers, now they stay in China for the Shoppers!
The uncertain outlook ahead should remind us all, that it is not the strongest that survive, nor the most intelligent, but the ones that are most adaptable to change. Businesses that cannot, or do not, adapt to the next new normal will face a very ambiguous future. Be prepared – and expect the unexpected!



Mark Millar

International Keynote Speaker, Commissioned Author, Trusted Advisor and Supply Chain Thought Leader

Mark Millar is an internationally renowned keynote speaker; a respected authority on supply chain and logistics; and author of the widely-acclaimed book Global Supply Chain Ecosystems.A LogiSYM Thought leadership Champion, Mark leverages 30+ years' global business experience to provide knowledgeable and independent perspectives that empower executives to make better-informed decisions. A Visiting Lecturer at Hong Kong Polytechnic University, Mark advises companies large and small -helping clients with their strategic growth objectives and supply chain strategies.

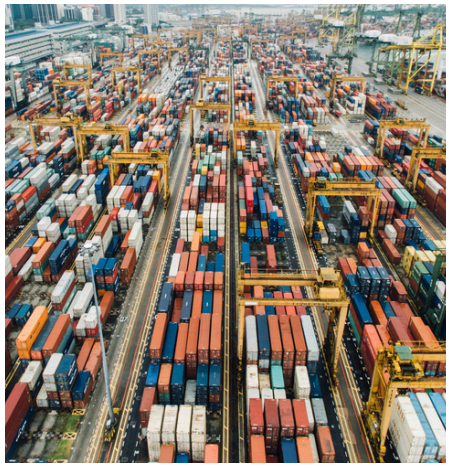
2026 Logistics and Supply Chain Outlook

By Scott W. Luton, Founder and CEO, Supply Chain Now

As we move into 2026, logistics and supply chain leaders will continue to face a landscape defined by a variety of converging forces: geopolitical and trade volatility; the accelerated integration of transformative AI and automation technologies; critical talent and skillset shortages; energy supply and other infrastructure concerns; and persistent economic uncertainty.

But wait, there's more: the ever-increasing velocity of global business requires supply chain organizations to tackle all of that (and more) on a faster and faster basis. And deliver, on time and in full.
Some trends will continue in 2026. For example, those organizations that effectively turn data into timely, quality and confident decisions - well, those will be the organizations that continue to be rewarded with better outcomes and performance.

To that end, there's no time like the present to invest in the acceleration of your digital maturity and AI adoption. In fact, the risks of being slow to adopt AI in a targeted, operational and results-driven manner will be even greater in the months ahead.
Speaking of innovative technology, we must have a workforce that is properly trained to meet the moment. Supply chain organizations must make it a priority to strengthen workforce capability and capacity. The talent gap is evolving and adding layers of complexity. We must continue to upskill the critical human factor in digital tools, automation, and problem-solving. At the same time, we cannot ignore the leadership imperative that this exciting new era has posed to global supply chain. Organizations must make it a priority to attract, cultivate and invest in leaders who can successfully operate in a tech-enabled, rapidly-changing environment.



Organizational success will hinge on disciplined digital investment, intentional workforce development, and leaders who can translate strategy into measurable action. The companies that treat these priorities not as projects, but as ongoing commitments, will be the ones positioned to outperform.
2026 will challenge the global supply chain. But the Good News? It will also create extraordinary opportunities for those prepared to seize them.



Scott W. Lutton

Founder and CEO, Supply Chain Now

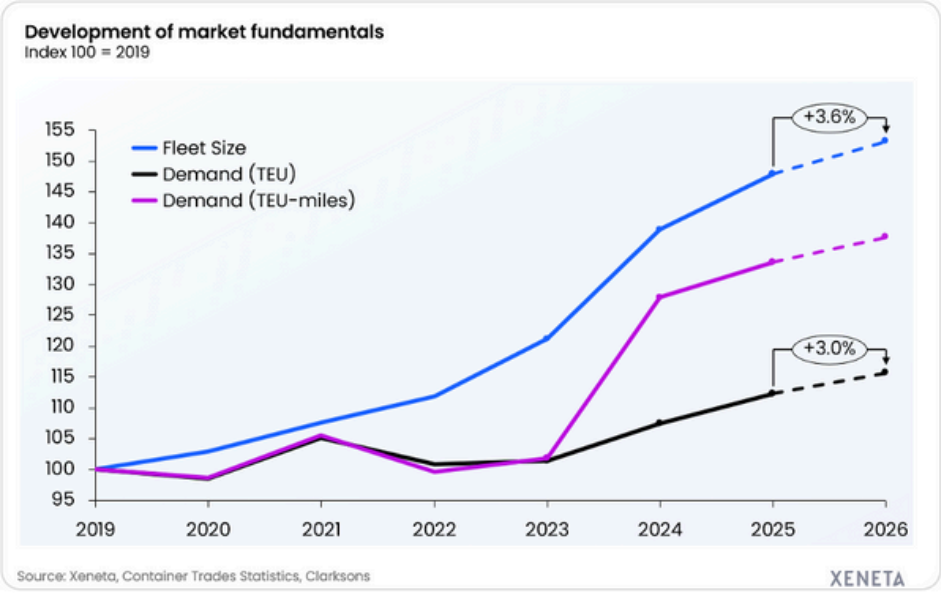
Scott W. Luton is the Founder and CEO of Supply Chain Now, the #1 voice of Supply Chain. Supply Chain Now is an award-winning global digital content platform dedicated to the global supply chain industry and its robust community. At the heart of the platform, is the almost daily Supply Chain Now podcast, which has hit podcast leadership charts in over 60 countries. With over 20 years of extensive experience in the end-to-end supply chain, Scott has become a recognized global thought leader in the industry. His insights have been featured in major publications such as The Wall Street Journal, USA Today, the Atlanta Journal-Constitution, and CNN. In 2024, Thinkers360 named him the #1 Global Thought Leader and Supply Chain Influencer.

2026 Ocean Outlook

By Peter Sand, Chief Analyst, Xeneta

The core message of Xeneta's Ocean Outlook is that 2026 should be calmer than the last few years but still shaped by geopolitics and structural changes – and shippers should use this window to reset procurement strategies.
Key messages:

- **Macro backdrop improves:** IMF forecasts stronger GDP growth in the US and EU in 2026, while some of the exceptional shocks of recent years (pandemic whiplash, extreme demand surges) fade. This should support moderate growth in containerized trade rather than boom-and-bust cycles.
- **Geopolitics stays in the driver's seat:** Trade policy – especially US–China tariffs, port fees on Chinese-built and US-built ships respectively and wider great-power rivalry – keeps keeps uncertainty high – despite the 12 months hiatus that's put on it. More generally and increasingly likely, new tariffs or sanction shocks remain a real risk for supply chains between any nation or trade-block.
- **Demand is reshuffling, not shrinking:** Overall container demand is expected to grow around 3% in 2026, but with clear shifts: weaker US imports, China finding alternative markets, and changing sourcing patterns that test the "China+1" narrative. Changing trade patterns seen in 2025 are seen to stick around.
- **Red Sea disruption recently became more of a 'wild card':** Large-scale return of container ships to the Red Sea is unlikely near term but shouldn't be ruled out in the mid-term.



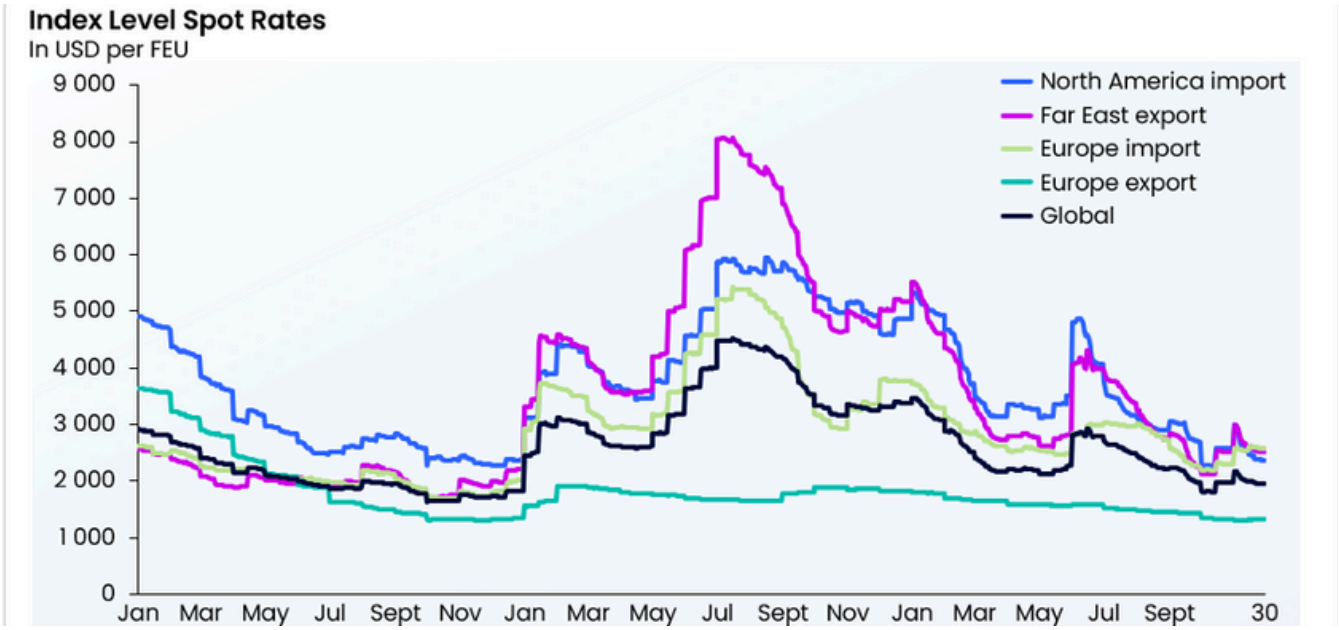


Peter Sand

Chief Analyst, Xeneta

Peter Sand joined Xeneta in 2021, as the Chief Analyst. Heading a team that delivers expert insights on container shipping and air cargo industries - from a logistics perspective.

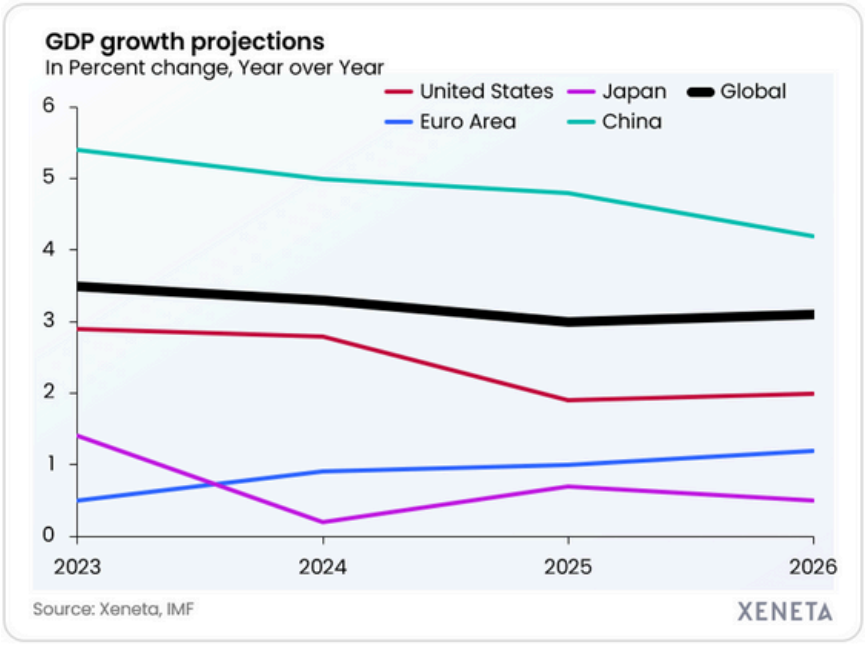
Focus on the essential drivers, demand and supply - and obviously the freight rates that impacts us all. Xeneta is the leading ocean freight rate benchmarking and market intelligence platform transforming the shipping and logistics industry.

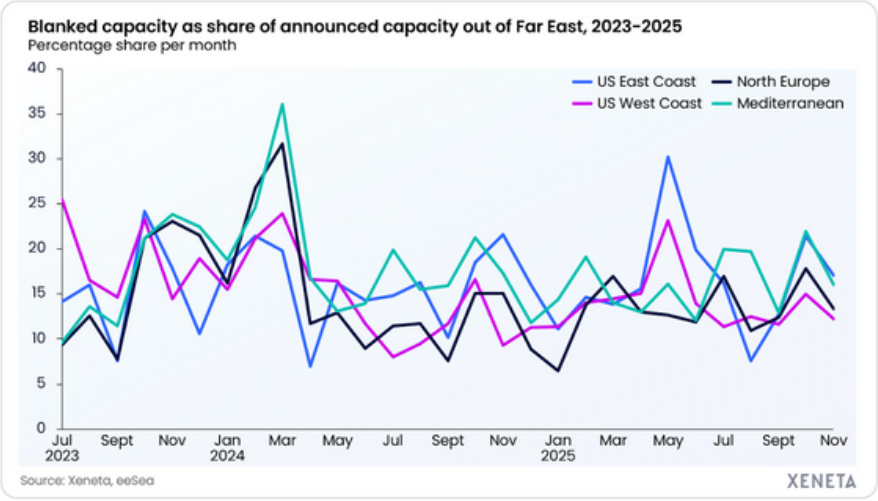


- **Massive orderbook reshapes supply:** A record pipeline of new ships for delivery between 2026 and 2030 – more than 10m TEU and fleet growth of roughly 3–4% in 2026 – arrives against softer demand. Limited scrapping and policy drives such as US shipbuilding support add to overcapacity risk and downwards pressure on rates.

- Carrier performance diverges: New network structures, notably Gemini Cooperation, deliver best-in-class schedule reliability while others lag. Blank sailing and capacity management remain key tools for all carriers as they seek to balance services and trade lane requirements.

Overall, spot and contract rates are expected to keep declining through 2026, giving shippers and BCO's a chance to negotiate improved contracts, lock in better service and build more resilient, data-driven freight strategies.





https://www.xeneta.com/outlook/2026-ocean-freight-outlook

2026 Outlook for Logistics & Supply Chain

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

As 2026 gets under way, much challenge and uncertainty will confront logisticians as global trade continues to adjust to the new world order ushered in by massive change in US tariff policy beginning in early 2025.

It is possible that tariffs begin to subside as a daily disruptive factor in supply chains, as the Trump administration eases back from its tactics seen throughout much of 2025. Ahead of US midterm elections on November 6, 2026, policy will be increasingly guided by cost impact on consumers given its potential as a decisive political factor in the elections.

Already in November 2025 the US administration scrapped tariffs on beef, coffee, tropical fruits and a range of other commodities in response to a perceived need to mitigate high consumer prices that could be a factor in the midterms.

This could mean that the daily head-turning headlines seen during the first half year of the second Trump administration could begin to recede, allowing supply chain leaders to adjust to remaining tariffs amid an environment of less uncertainty.

Another big issue logisticians may confront in 2026 is the Red Sea diversions. There is growing geopolitical pressure on container lines to restore normal routings between Asia and Europe and Asia and the North American East Coast.

Egypt is desperate to eliminate a problem that has cost it billions in lost toll revenue since ships begin diverting in late 2023 to avoid attacks by the Houthi rebels in Yemen. And with the Oct. 13 peace conference held in Sharm El-Sheikh, Egypt attended by Sisi, US President Donald Trump and representatives of 20 countries, the Israel-Hamas peace agreement was ratified by an international coalition.

The peace conferenced endorsed the October agreement between Hamas and Israel to end the war in Gaza, the event that led the Houthis to start firing on shipping in late 2023. So in theory, peace between Israel and Hamas peace should end the attacks and re-open the waterway.

But from carriers' point of view, Israel-Hamas peace remains tenuous, meaning that were they to restore routings through the Suez and the extensive re-working of shipping networks that would entail, not to mention predictions of months of port congestion in Europe and the North American East Coast, it all could be set in reverse if Houthi attacks were to resume.

Could things come to a head in 2026? It's certainly possible.



Peter Tirschwell

Vice President, Journal of Commerce by S&P Global

Peter Tirschwell is Vice President, S&P Global Market Intelligence, based in Singapore. He leads the Journal of Commerce, a team of business journalists covering end-to-end global supply chains.

He is also the founder and chairman of the TPM conference, the world's largest container shipping event.

A career business journalist with over 30 years at the Journal of Commerce, he writes news analysis, speaks at industry groups, and has authored Op-Eds for the Wall Street Journal and the Washington Post.



Building Resilience in Healthcare Supply Chains: A Conversation with Cardinal Health's Benjamin Brinker

How one of healthcare's largest distributors is leveraging AI, diversification, and regional hubs to navigate a post-pandemic world

By Brett Marshall

In the complex world of medical device and pharmaceutical distribution, few have the vantage point of Ben Brinker, who oversees international operations for Cardinal Health's Global Medical Products and Distribution business. With over 25 years in healthcare—spanning medical device sales, marketing, and now global operations - Brinker has witnessed firsthand how the pandemic fundamentally reshaped supply chain strategy. We sat down with him to discuss how Cardinal Health is building resilience through technology, supplier diversification, and strategic investments in Asia-Pacific operations.

FROM MARKETING TO OPERATIONS: A CAREER JOURNEY

Q: You've spent 25 years navigating the evolution of healthcare distribution. What pivotal moments or decisions shaped your transition from commercial roles to leading global operations?

Brinker's path to his current role reflects the evolution of healthcare distribution itself. Starting in medical device sales with Tyco Healthcare and later Covidien, he built his career in marketing and commercial roles, managing everything from at-home patient care to global product portfolios. His move to Medtronic brought exposure to globalization in wound care, thermometry, nutritional delivery, and deep vein thrombosis prevention compression therapy products, and when that business divested to Cardinal Health, Brinker came with it.

"I've been at Cardinal Health for almost nine years," Brinker explains. "I started in marketing running global specialty products, which gave me a good sense of our global network." The Cordis divestiture—a legacy Johnson & Johnson business—proved pivotal. "When that was divested, we had to reshape the international network commercially. I led the international team through that process, and for the last three years, I've been running the operations—which is new for me but a great experience."

THE POST-PANDEMIC SUPPLY CHAIN LANDSCAPE

Q: The pandemic exposed vulnerabilities in healthcare supply chains globally. Three years later, which changes have proven permanent versus temporary, and what surprised you most about how the industry adapted?





The pandemic created permanent shifts in how medical distribution operates, according to Brinker. Three major trends stand out:

Heightened focus on service levels and disaster preparedness.

"Pre-COVID, strategic product stockpiles and business continuity weren't top-of-mind for all customers," Brinker notes. "Now there's heightened awareness and much deeper partnership around those topics."

Product consolidation and deeper partnerships.

The industry has seen notable consolidation in products consumed, with partnerships deepening from device distribution to customers - whether hospitals or home care providers. "We have better provider partnerships now than pre-COVID, which supports our operations transformation," he says.

Evolution in contracting methods.

The way Cardinal Health structures agreements with both suppliers and customers has fundamentally changed, reflecting new realities around supply volatility and risk management.

AI-DRIVEN SUPPLY AND DEMAND PLANNING

Q: Cardinal Health has invested significantly in AI and automation. Can you quantify the impact - what specific metrics improved, and were there any unexpected consequences or limitations you encountered?

While IoT and GPS tracking have found applications - especially around sterilization monitoring and lot tracking - Brinker identifies AI-generated insights as a transformative technology investment.
"The biggest benefit we've seen is from AI in supply and demand planning," he explains.

"We've made significant investments in advanced models that have improved our service levels, reduced backorders, and balanced our inventories globally."
This represents a fundamental shift in Cardinal Health's operating model. "We've moved from a very US-focused approach to a more globally balanced inventory and planning approach," Brinker says. The AI system links forecasts to forward deployment of inventory based on expected needs, enabling proactive rather than reactive responses.

Q: What resistance did you encounter internally when proposing AI investments, and how did you build the business case?

Cardinal Health partnered with a technology provider whose planning system uses AI analytics to position products optimally across their global network. "AI helps us with disaster prevention," Brinker emphasizes. "It allows better response than our previous manual processes by predicting where products need to be before demand spikes occur."

DIRECT-TO-PATIENT DISTRIBUTION: TECHNOLOGY MEETS LOGISTICS

Q: Given the shift toward home-based care, how is Cardinal addressing the growing direct-to-patient delivery trend, and what percentage of your business does this represent?

The shift from institutional to home-based care presents unique challenges. Demand volatility at home is far greater than in institutional settings, requiring different distribution strategies. "We use a hub and spoke model to help ensure more even deployment of products," Brinker explains. "Technology and automation

deployed within our distribution sites lower costs for small-order picking." This automation is crucial for parcel shipments—traditional distributors without it have failed to compete effectively. Interestingly, this technology is influencing traditional business as well. "We're seeing increased demand for customization even in our institutional business," he notes, suggesting convergence between B2B and B2C fulfillment strategies.

Q: Are hospital customers evolving their supply chain capabilities?

They are, particularly in North America, but increasingly they rely on Cardinal Health for front-end distribution solutions. "Partner selection is increasingly driven by technology-enabled distribution options," Brinker observes, whether that's traditional distribution, 3PL, or 4PL arrangements

ASIA-PACIFIC: THE STRATEGIC EPICENTER

Q: Cardinal Health has made Singapore the epicenter of its APAC operations. Walk us through the strategic calculus—why Singapore versus other regional hubs, and how does this positioning create competitive advantage?

Asia is central to Cardinal Health's operations in multiple ways. The company maintains three manufacturing sites in the region, which are critically important to their global portfolio. And while a significant proportion of sourcing comes from Asia, Cardinal Health has diligently ensured a diversified supplier base, building resilience. But the most significant investment has been in Singapore."We've made heavy investments in APAC, especially in Singapore as our APAC operations center," Brinker says. "We have R&D there, global sourcing, and it serves as our regional hub.

" A significant portion of Cardinal Health's sourcing comes from Asia, making supplier development and diversification essential. "We've made significant investments in our APAC team capabilities around quality, regulatory, and global trade," he adds. These capabilities are necessary not just for sourcing but for navigating complex regulatory requirements across markets.

Q: Do Asia-based partners match US and European capabilities?

Internally, Brinker sees no significant difference. Externally, it varies by country. "Supplier development is accelerating due to regulatory demands from the US and Europe," he explains. "Cardinal Health invests heavily in supplier education around CE marks and FDA standards." The gap is closing, but requires active partnership. "We're working with suppliers to help them understand and meet the standards required for global markets," he notes.

FROM SOLE-SOURCE TO DIVERSIFICATION

Q: How have supplier relationships in Asia evolved?

The shift has been dramatic.



Pre-COVID, Cardinal Health operated with more sole-source arrangements and an entrenched supply base. "Now we focus on diversification and optionality for resiliency," Brinker says. "We're making ongoing investments in APAC capabilities, especially beyond just sourcing."

Supplier attitudes have evolved as well. "Pre-COVID, there was more resistance to change," he recalls. "Now suppliers embrace rapid evolution." Low-cost, "take it or leave it" approaches are being replaced with partnership models. "We no longer work with resistant suppliers," Brinker states bluntly.

SUSTAINABILITY: FROM COMPLIANCE TO COMPETITIVE ADVANTAGE

Q: How have sustainability requirements changed?

Sustainability has transformed from a compliance checkbox to a competitive requirement. "It's now a key factor in bidding and winning contracts," Brinker explains. "Customer and government demands make sustainability critical."
Healthcare is catching up to other industries in this regard. "Sustainability is as critical as resilience now," he emphasizes. Companies that don't meet sustainability standards increasingly find themselves excluded from opportunities.



THE CHINA PLUS STRATEGY

Q: How do China and India compare as manufacturing hubs?

Cardinal Health maintains more business with China, where suppliers are generally more advanced. But tariffs have driven what Brinker calls a "China Plus strategy."

"Diversification is our top priority, though cost remains a challenge," he explains. "Quality and financial viability drive our continued China engagement, but we're actively developing alternative sources."
India's supply base is smaller but growing. The focus is on building multiple viable options rather than simply shifting from one single source to another.

LOOKING AHEAD: 2026 AND BEYOND

Q: Looking ahead to 2026, what does the landscape look like for Cardinal Health? Beyond tariffs, what other geopolitical risks are on your radar—export controls, sanctions, regional conflicts?

Brinker's outlook is cautiously optimistic, shaped by both challenges and opportunities. In the US market, tariffs have driven model resiliency through diverse, multi-source supply strategies. "Our focus is on cost management and meeting patient requirements through specialty products and resiliency," he says.

Outside the US, the picture is brighter. "We expect tremendous growth in countries where we have the right commercial model," Brinker notes. This international expansion represents a major



opportunity.
Geopolitical uncertainty remains a wild card. "Spreading risk is the right approach," he concludes. "We're optimistic about Cardinal Health's position, but we maintain flexibility to adapt as conditions change."

KEY TAKEAWAYS FOR SUPPLY CHAIN LEADERS

Several lessons emerge from Cardinal Health's approach:

•**AI as operational infrastructure:** Advanced planning systems aren't optional—they're essential for managing global complexity and volatility

•**Diversification over optimization:** Resiliency now outweighs pure cost efficiency in sourcing decisions

•**Regional hubs enable global reach:** Strategic investments in locations like Singapore provide operational leverage across multiple functions

•**Supplier partnerships require investment:** Educating and developing suppliers creates more reliable, capable partners

•**Sustainability is strategic:** Environmental and social standards directly impact competitive positioning

•**Automation scales customization:** Technology enables personalized service at institutional scale.

As healthcare continues to evolve across product manufacturing, distribution and patient care, Cardinal Health's experience offers a roadmap for navigating complexity while maintaining service excellence. The companies that thrive will be those that view supply chain not as a cost center, but as a strategic capability requiring continuous investment and evolution.





Benjamin Brinker

President, Global Operations & Supply Chain at Cardinal Health

Brinker has over 20 years of sales, marketing and general management experience — leading commercial teams, both domestic and international. Ben was previously president of International Medical Products and Distribution for the Cardinal Health Medical segment, where he led the International Focused Growth strategy and commercial model implementation. In this role, he was responsible for all commercial activities across Canada, Japan, Asia, Europe, the Middle East, Africa and Latin America.

CardinalHealth

CARDINAL HEALTH IN BRIEF

Cardinal Health is a distributor of pharmaceuticals and specialty products; a supplier of home-health and direct-to-patient products and services; an operator of nuclear pharmacies and manufacturing facilities; a provider of performance and data solutions; and a global manufacturer and distributor of medical and laboratory products. Our company's customer-centric focus drives continuous improvement and leads to innovative solutions that improve people's lives every day.



Outlook 2026: Innovation, trust, and transformation in motion

By Simon Tan, Managing Director, Körber Supply Chain, Singapore & Malaysia

2025 was the year of innovation, and for Körber Supply Chain, that innovation went beyond technology. It was also about our people, purpose, and progress - driven by the evolving needs and unwavering trust of our customers. Across industries, businesses increasingly sought flexible, modular, and scalable systems - solutions that could evolve with changing market realities, overcome labor shortages, and deliver efficiency in a volatile global environment.

This shift reaffirmed our belief that innovation is not just about advancement, but about earning and sustaining customer confidence through reliability and results. Our response to this momentum was reflected in initiatives such as AI-based single-item picking developed with Sereact, and the ErgoUnload system, which redefines parcel handling by combining efficiency, ergonomics, and performance. These solutions exemplify how Körber continues to address the industry's most pressing challenges from workforce constraints to time and cost pressures through intelligent and adaptive automation.

BEYOND TECHNOLOGY: THE POWER OF COLLABORATION

Across regions and sectors, we expanded our footprint and delivered transformative projects built on one principle, customer success.

Throughout the year, our teams worked more closely than ever before. Engineers, software specialists, project managers, and service experts collaborated seamlessly to deliver complex projects on time and at scale. This interdisciplinary teamwork became one of our defining strengths, enabling us to deliver results even in challenging market conditions. A standout example was a Cold Chain automation project on the island of Cebu in Philippines and Vietnam, where our ASRS solution enhanced warehouse efficiency by accelerating delivery cycles, optimizing space utilization, and ensuring reliable temperature control for sensitive goods.

SECTOR GROWTH AND REGIONAL DYNAMICS

While the 3PL sector remained a major growth driver, other industries also accelerated automation.



Simon Tan

Managing Director
Körber Supply Chain
Singapore & Malaysia

In pharmaceuticals, rising demand for cold chain logistics driven by diabetes and obesity treatments, spurred investment in precise, compliant systems, while FMCG and manufacturing focused on optimizing inventory and operational efficiency. Across sectors, modular, scalable systems and intelligent software integration became vital to boosting throughput and reducing manual dependency. In the 3PL space, capex-light automation and mobile robotics including AMRs and Goods-to-Person solutions emerged as key technologies driving agility in operations. In Southeast Asia, growth remained steady though measured.

AMRs and Goods-to-Person solutions emerged as key technologies driving agility in operations. In Southeast Asia, growth remained steady though measured. Warehousing and manufacturing hubs in Indonesia, Vietnam, and Thailand continued to integrate automation strategically, balancing operational efficiency with long-term cost control. This regional momentum reflects the broader trend of manufacturing diversification and nearshoring, positioning Southeast Asia as a critical node in the evolving global supply chain landscape.

SUSTAINABILITY: NOT AN ADD-ON, A MINDSET

As automation advances, sustainability has become inseparable from innovation and remains a core pillar of Körber's long-term strategic vision. It's not only a global responsibility but also a source of tangible value helping customers lower operational costs through smarter and optimized resource use. By embedding sustainability into every solution, Körber ensures that progress and responsibility move forward together, driving both environmental and business performance. In 2025, we made measurable progress: lowering operational costs, introducing energy-regenerative stacker cranes, optimizing conveyor drives, and deploying control systems \hat reduce powerb consumption. Equally important, our people continued to champion sustainability in their daily work, embracing digitalization, paperless processes, and conscious resource management. Across the industry, sustainability has evolved beyond energy efficiency, with warehouses increasingly adopting renewable-powered infrastructure, circular system design, and data-driven energy monitoring to support carbon-neutral operations and transparent ESG performance.

TECHNOLOGY AND THE ROAD AHEAD

The automation landscape is shifting from efficiency to intelligence. The coming years will bring deeper integration between robotics, data analytics, and AI-driven control systems.

Warehouses are evolving into connected ecosystems where data flows seamlessly from individual components to Warehouse Control Systems (WCS), Warehouse Execution Systems (WES), and enterprise ERP platforms. This connectivity enables real-time insights, predictive maintenance, and smarter inventory control, helping businesses operate with greater agility and foresight.

Looking ahead to 2026, the warehouse automation industry is set to maintain strong momentum. For Körber, the focus will be on strengthening our position in automation and parcel logistics - shaping the future of global supply chains through intelligent, connected, and sustainable solutions, powered by the trust of our customers, partners, and people, and guided by a shared commitment to lasting impact.

Because for Körber, the goal isn't just to automate - it's to make the world work better, together.

Connect with our experts at info.sc.sgp@koerber-supplychain.com or visit www.koerber-supplychain.com to explore our solutions.





Toll Group launches Singapore's first electric decarbonisation hub

Singapore, 12 December 2025 – Toll Group, a leading global transportation and logistics provider, is accelerating the decarbonisation of maritime logistics with the launch of Singapore's first decarbonisation hub* dedicated to electric supply vessels. This 12-month proof of concept, developed in partnership with Yinson GreenTech, sets a new benchmark for smart, safe, and sustainable port operations aligned with Singapore's Green Plan 2030 and Toll Group's commitment to achieving global net-zero ambitions.
The initiative is expected to cut emissions by up to 80% per trip, saving more than a tonne of CO_2 per trip, while optimising vessel movements and leading to overall improvements in operational efficiency.

"This project will deliver real-world data and insights to guide future regulations and accelerate innovation across Asia," said Jonathon Kottegoda-Breden, President Asia Logistics, Toll Group. "By establishing Singapore's first decarbonisation hub dedicated to electric supply vessels, we aim to enable broader adoption of green maritime technologies, reduce fossil fuel dependency, and cut emissions throughout the region."

The hub integrates electric marine transport, smart warehousing, and efficient cargo trucking into a digitally connected end-to-end operation. Real-time coordination ensures clean, responsive logistics and service levels for customers in one of the world's most dynamic logistics hubs.

"Singapore is a critical growth engine for Toll, and this launch reflects our commitment to building smarter, cleaner supply chains," continued Jonathon Kottegoda-Breden. "We're pioneering a blueprint for sustainable maritime logistics across Asia."

Purpose-built charging infrastructure and smart cargo handling equipment will maximise uptime and ensure predictable turnarounds for time-sensitive cargo. Digitally verified processes will guarantee fast, safe, and efficient transfers.

"By integrating electric vessels with smart infrastructure and digital processes, we're showing how sustainable solutions can deliver both operational efficiency and significant emissions reductions," added Rajeev Sood, Executive Vice President – Energy, Marine & Renewables, Asia Logistics, Toll Group.



Electric Vessel Charging Station at TOPS Hub
Singapore's first electric vessel charging station at Toll Offshore Petroleum Services (TOPS) powering the transition to cleaner, smarter, and more sustainable port operations.



TOPS Hub Ribbon-Cutting – Launch of Decarbonisation Initiative. Ribbon-cutting ceremony at Toll Offshore Petroleum Services (TOPS) hub, marking the official launch of Singapore's first decarbonisation hub for electric supply vessels. From left to right: Jonathon Kottegoda-Breden, President Asia Logistics, Toll Group; Thomas Knudsen, Executive Chairman, Toll Group; Mr. Tay Yuan Sherng, Director of Decarbonisation Planning & Infrastructure, Maritime and Port Authority of Singapore (MPA); Rajeev Sood, Executive Vice President – Energy, Marine & Renewables, Toll Group; Jan-Viggo Johansen, MD of marinEV, Yinson GreenTech

As Toll advances this next phase of sustainable logistics, the company remains committed to helping move the businesses that move the world.

The launch was marked by a media and customer event featuring a ribbon-cutting ceremony and an exclusive product tour, giving attendees a first-hand look at the hub's advanced infrastructure and electric vessel technology.

* A decarbonisation hub is a centralised facility that drives the transition to low-carbon operations by integrating clean energy technologies, infrastructure, and processes to reduce emissions across supply chain.



About Toll Group

At Toll, we do more than just logistics - we move the businesses that move the world. Our 14,000 team members can help solve any logistics, transport or supply chain challenge – big or small. We have been supporting our customers for more than 130 years. Today, we support more than 20,000 customers worldwide from around 300 sites in over 30 markets, and a forwarding network spanning 140 countries. We are proudly part of Japan Post — www.tollgroup.com.



Reality Check – What Belém's COP30 Means for Global Freight

By Wolfgang Lehmacher and Mikael Lind

At COP30 in Belém, a paradox emerged. The summit did not deliver the breakthrough in emissions that scientists hoped for and that supply chain professionals needed. Yet, it might have improved the structuring of climate action. While the final text exposed old tensions, new structures emerged that will guide how money, standards, and expectations flow into the greening of freight and logistics.

Big political questions about fossil fuels and deforestation remain unresolved. A signal nonetheless reached the industry: multilateral climate diplomacy still matters, but companies will be judged on what they deliver, not what they declare. Executives who wait for flawless global agreements will slip behind. Those who align early with the new implementation architecture will shape the future of trade and society.

AN IMPLEMENTATION ARCHITECTURE

Transformation in trade and supply chains takes root when policy, capital, and collaboration reinforce shared ambition. COP30 in Belém marked a step toward that convergence, as the Global Climate Action Agenda is evolving from a list of initiatives into a coherent framework anchored in the Paris Agreement.Zero-emission freight corridors, low-carbon shipping routes, near-real-time emissions data platforms, and green-finance programmes align under a new architecture.

This should structure capital, political will, and technical capacity to reduce emissions, strengthen climate resilience, and ensure a just transition for workers and communities. Logistics companies that plug into these coalitions will find it easier to access funds, influence standards, and shape regulation. A Global Implementation Accelerator launched in Belém aims to move countries and sectors from plans to projects by tackling obstacles such as limited financing, weak pipelines, skills gaps, and misaligned incentives. Logistics brings all issues together in one place. Assets, operational data, and exposure to climate impacts and policy shifts make transport a good testbed.

WHAT ALREADY CARRIES WEIGHT

Belém did not start from zero but built on earlier COPs projects. High-volume truck corridors with electric vehicles and large-scale charging infrastructure are recognised as part of the official climate agenda. Shipping follows a similar pattern. More end-to-end trade routes are being





Illustration: Sandra Haraldson



prepared as "green corridors," with ports and shipping lines agreeing on cleaner fuels, better data sharing, and stronger environmental standards. The future of low-carbon trade will be written as much in Belém, Durban, and Manila as in Rotterdam or Los Angeles. Countries such as Brazil are starting to integrate corporate emissions data into national platforms, giving planners and investors a clearer view of where emissions occur and how they can be cut.

Policy signals reinforce these shifts. Authorities are beginning to reward load consolidation, shifts to rail or inland waterways, and routing tools that cut empty miles. Companies that provide transparent emissions data already see advantages when public funds are allocated.

FOSSIL FUEL ROADMAP FAILURE AND THE ACTION GAP

The sharpest gap in Belém concerned fossil fuels. Many hoped COP30 to produce a global roadmap for phasing out coal, oil, and gas. The final text avoided naming these fuels directly, even after three decades of climate talks. Today's decisions about ships, trucks, terminals, and depots will define emissions for decades. Assumptions about future fuel prices, regulations, and customer demand drive fleet renewal strategies, fuel infrastructure investments, and route choices. The absence of a global timeline pushes transaction risks onto company balance sheets and into contracts.

An action gap persists. On the one hand, initiatives, standards, and funding push the sector to cut emissions and report them more accurately. On the other hand, the lack of a shared fossil-fuel exit path and a complete deforestation plan leaves investors and operators guessing about how quickly conditions will change. Financing terms, contract clauses, and insurance costs will reflect that gap. If current trends continue, investors are likely to put a higher risk premium on companies that assume today's rules will hold. Leaders who act reduce the risk of future shocks and are better positioned if policy and market shifts accelerate.

FINANCE PROMISES, ACCESS PROBLEMS

Some headlines from Belém highlighted rising climate finance pledges and a decision to increase adaptation funding. Momentum exists, but two questions matter most for logistics: who will receive these funds, and how fast?

The transport and logistics sector is essential and highly exposed to climate risks, yet projects often span ministries, agencies, and corporate boundaries. Investments such as port electrification, public charging networks for trucks, or climate-resilient rail lines need coordination among multiple public authorities and private players. Many emerging

markets lack the capacity to prepare bankable project pipelines at scale. Funds risk going unused or flowing into simpler projects that do not move the needle towards a sustainable future.
Adaptation finance is particularly urgent. Ports, coastal facilities, inland waterways, and key road and rail corridors already face more frequent disruption from storms, floods, and heatwaves.

Higher adaptation pledges signal that support should grow. Yet delays in turning these into upgraded assets will be felt quickly in the form of rising insurance premiums, service interruptions, and widening gaps between climate-ready and climate-exposed routes. Leading logistics companies treat adaptation as a core business topic.

JUST TRANSITION: WHO GAINS AND WHO LOSES ALONG THE CHAIN

One of Belém's most constructive outcomes was agreement on a new just transition mechanism. Policy tools and finance windows should help the least developed and most climate-vulnerable regions access technology and capital. The new mechanisms aim to reduce the risk that only large multinationals decarbonise, leaving local firms and workers stranded.
A just transition in freight has three pillars. Workers need reskilling and safe conditions as new ways of operating emerge. Communities alongcorridors should be able to influence infrastructure decisions. Small operators need fair access to finance and digital tools. embed these elements into their strategy will be better prepared when investors, regulators, and customers scrutinise who gains from climate action.
We cannot separate low-carbon transport corridors from forest and community protection. A highway that enables electric trucks but opens new frontiers to deforestation will not stand up to scrutiny.

Corridor design now needs to consider how logistics infrastructure interacts with forest landscapes, local livelihoods, and protected areas as a standard requirement. Practical measures include routing corridors to avoid sensitive ecosystems, integrating conservation zones into corridor plans, and partnering with local communities to support monitoring and enforcement.

TRADE, GEOPOLITICS, AND THE NEW RISK MAP

The discussions in Belém confirmed once again that climate policy is intertwined with trade and geopolitics. Decisions on border measures, industrial subsidies, and digital rules are reshaping the risk map for transport. Emissions data is moving from voluntary disclosure toward a de facto trade requirement in many markets. Logistics companies that can provide reliable data aligned with emerging standards will find it easier to serve



Mikael Lind

Senior strategic research advisor at RISE and (Adjunct) professor in Maritime Informatics at Chalmers

Dr Mikael Lind is (Adjunct) Professor in Maritime Informatics at Chalmers University of Technology and Senior Strategic Research Advisor at Research Institutes of Sweden (RISE). He has initiated and headed a substantial part of several open innovation initiatives related to ICT for sustainable transports of people and goods.

In his capacity of the world's first professor in Maritime Informatics he also part time at the Chalmers University of technology (M2), Sweden, exploring the opportunity of maritime informatics as an applied research field. Lind serves as an expert for World Economic Forum, Europe's Digital Transport Logistic Forum (DTLF), and UN/CEFACT. He has been the lead author of many concept notes associated to maritime and transport informatics brought up by international trade press and has become recognized thought leader in Maritime Informatics.

exposed customers and markets. Companies that cannot do so risk more checks, higher costs, or exclusion from some supply chains. Companies that do not decarbonise will face increasing pressure on their licence to operate from regulators, customers, and communities.
Competition over infrastructure adds another layer. Major powers use port investments, rail lines, and digital platforms to extend influence. Logistics companies can navigate this environment with a clear view of political risk.

WHY LOGISTICS CANNOT WAIT

Belém again exposed weaknesses in a consensus process that demands agreement from nearly 200 parties on every line. International climate diplomacy still matters. Global agreements set reference points, legitimize action, and provide a common language. The pace of climate impacts and technology adoption now exceeds the pace of formal negotiations. Companies need to treat the UN process as one critical track among several. International decisions provide frameworks and tools, but sectoral coalitions, regional groupings, and corporate choices will determine whether emissions fall and resilience improves.

A CHOICE AND A SHORT ACTION LIST

Belém delivered neither the breakthrough many hoped for nor the breakdown some feared. The summit offered a reality check: while ambition in the text remains below what science and vulnerable communities need, the implementation structures, finance signals, and just-transition tools are now more concrete.
It is our decisions that will decide whether COP30's implementation architecture becomes a turning point or a missed chance. An effective board-level agenda demands:

1. Build a trusted emissions data backbone: measure emissions in priority lanes and assets using primary data, standardise methods across the group, and align route-level emissions with cost and service KPIs.

2. Design or join a green corridor: select a strategic trade lane, convene key partners, and agree on a shared roadmap for assets, supporting infrastructure, and data sharing.

3. Put climate resilience into every capex and network decision: require climate-risk assessments for significant investments and redesigns, and favour projects that cut emissions.

4. Embed just transition in corridor and fleet plans: map affected workers and communities, co-design reskilling and local-benefit plans, and treat fair outcomes as a condition for scaling new technologies.

5. Align corridors with nature and forest protection: identify sensitive areas, adjust routes and designs to protect them, and document how logistics investments support, rather than erode, natural capital.

Leaders who act on this agenda will strengthen competitiveness and license to operate. Their actions will also help keep the global climate process alive at the pace that real-world systems and societies need.



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.



The Future of Logistics and Supply Chains in Asia, 2026

Dr. Marco Tieman

The year 2025 set the stage for major transformations in global trade and logistics. While much of the world adjusted to new supply chain realities following years of volatility, 2026 will be defined by a deeper restructuring of trade routes, production networks, and logistics capabilities. Geopolitical realignments—intensified by shifts in the Middle East, the ongoing decoupling between the US and China, and renewed focus on regional self-reliance—will continue to reshape the global logistics map. The new logistics landscape will be characterised by re-regionalisation of supply chains, AI-driven automation, green corridors, and the integration of Islamic finance and halal compliance in global value chains.

Four key logistics and supply chain trends are expected to shape 2026:

1. The rise of regional trade corridors and South–South logistics integration.
2. The acceleration of AI and digital sovereignty in supply chains.
3. The expansion of halal and ethical value chains across OIC economies.
4. The shift from green logistics to climate-resilient logistics systems.

RISE OF REGIONAL TRADE CORRIDORS

The global logistics map is being redrawn. As trade tensions, sanctions, and geopolitical rivalries fragment traditional routes, countries in Asia, the Middle East, and Africa are investing heavily in new regional and inter-regional corridors. The India–Middle East–Europe Corridor (IMEC), China's Belt and Road 2.0, and ASEAN's push for intra-Asian connectivity are redefining trade gravity. The Middle East continues to emerge as a central logistics hub—linking Asian production with European consumption—while Southeast Asia consolidates its position as the world's manufacturing and distribution backbone.

This "re-regionalisation" trend will accelerate in 2026, driving investment in multimodal infrastructure, bonded logistics zones, and industrial clusters that emphasise sustainability and supply security.

DIGITAL SOVEREIGNTY AND AI-DRIVEN SUPPLY CHAINS

After several years of digital transformation, 2026 will mark the maturation of AI in logistics operations. Predictive analytics, machine learning, and AI-enabled control towers will be mainstream tools for demand forecasting, route optimisation, and disruption management. Governments are also asserting digital sovereignty—developing national logistics data platforms to ensure that critical supply chain data remains under domestic control. Asia and the Middle East are expected to lead this evolution, as logistics hubs such as Singapore, Dubai, and Kuala Lumpur develop



regional standards for digital trade, blockchain verification, and trusted data exchange. Automation continues to expand beyond warehouses to port operations and last-mile delivery, supported by robotics, autonomous vehicles, and smart infrastructure. The future logistics workforce will increasingly combine digital literacy with strategic thinking —managing technology ecosystems rather than manual operations.

Brand owners are increasingly recognising that halal assurance must extend beyond production to the entire supply and value chain.
At the same time, the convergence of halal, sustainability, and Islamic finance is creating new business models.

Halal industrial parks, based on focused clusters, backed by solid supply chains & technology, addressing sustainability, and supported by Islamic finance waqf-solutions, will strengthen ethical and sustainable trade ecosystems—linking faith-based values with circular economy principles. These new generation of halal industrial parks, also known as Halal Park 2.0, will boost both halal production in OIC countries and as well as increase intra-OIC halal trade.

FROM GREEN LOGISTICS TO CLIMATE-RESILIENT LOGISTICS

Environmental sustainability remains high on the global agenda, but the conversation in 2026 will evolve from “green logistics” to climate-resilient logistics. The increase in extreme weather events, from floods to heat waves, has exposed the vulnerability of supply chains. Cities will intensify efforts toward zero-emission urban logistics, supported by electric fleets, hydrogen trucks, and urban consolidation centres. At the same time, logistics planners must invest in infrastructure resilience, adaptive routing, and real-time risk monitoring.

Collaboration among governments, industry, and academia will be key to developing logistics systems that are not only sustainable but also capable of absorbing shocks and ensuring business continuity.

CONCLUSION

2026 will be a pivotal year for global logistics—shaped by technology, sustainability, and a shifting geopolitical balance. The centre of gravity of global trade continues to move eastward, anchored by Asia and the Middle East as the engines of production, innovation, and logistics excellence.
The logistics industry is evolving from a cost-driven function into a strategic enabler of national competitiveness and resilience. Those investing early in AI, regional connectivity, halal assurance, and climate-resilient operations will define the benchmarks for the decade ahead. As we enter 2026, logistics professionals are no longer simply managing movement—they are designing the networks that sustain economies and connect the world.



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.



How to Navigate Terminal Congestion with Kpler

Terminal congestion has become one of the biggest cost drivers in global shipping, adding billions in demurrage, detention, and fuel expenses every year. In 2021 alone, shippers lost over $321 million in interest costs as cargo sat idle at congested ports according to Maritime Executive. These inefficiencies don't just slow trade; they inflate freight rates, extend lead times, and erode margins across the supply chain.

The real problem? Limited visibility at the terminal level. Operators often only see congestion once a vessel is already approaching port, too late to adjust routes or schedules.

Kpler's Container Intelligence changes that. It provides real-time, terminal-level congestion insights at global ports, helping carriers, shippers, and forwarders anticipate delays, plan proactively, and protect profitability.

DURBAN AT A GLANCE, A VITAL YET VULNERABLE HUB

The Port of Durban is sub-Saharan Africa's largest and busiest port, handling over 4.5 million TEUs and 31 million tons of cargo annually across 58 berths and 21 km of quayside. It serves as South Africa's key trade gateway to inland markets like Zambia, Zimbabwe, and Malawi.

Despite its scale and strategic role, Durban struggles with severe congestion and low terminal productivity. The 2024 World Bank Container Port Performance Index ranked it last out of 403 global ports, citing long vessel waiting times and poor operational efficiency.
In short, Durban remains critical for regional trade — but its logistical bottlenecks at terminal level make it one of the most challenging ports in the world for carriers and shippers to navigate efficiently.

WHY THIS MATTERS GLOBALLY

Each extra day of delay at Durban, Africa's largest container gateway, ripples through supply chains stretching far beyond Southern Africa. Successfully navigating congestion is now critical to maintaining margins, and it starts with terminal-level visibility.
Durban handles about 60% of South Africa's container traffic and acts as a key entry and exit point for goods moving in and out of the region.
While many blame seasonal demand or port-wide issues, the reality is clearer, disruptions start at the terminal, not the port.

GET GROUND-LEVEL VISIBILITY WITH CONTAINER INTELLIGENCE

With Kpler's Container Intelligence, users gain direct access to granular, real-time congestion data at the terminal level. You can see which terminals are backed up, how many vessels are in queue, current and forecasted vessel calls, and performance trends like average stay and waiting times, all refreshed every 30 minutes.

In the example below, Durban's three terminals, Terminal 1, the Multi-Purpose Terminal (MPT), and Terminal 2, show significant differences in operational performance. As of now, Terminal 1 shows higher congestion, while MPT is currently clear. Yet MPT's 6-month performance index is still underperforming compared to Terminal 1 at 4.8. This index compares the last 7 days of performance to the past 6 months: 1 = major underperformance, 5 =

average performance, 10 = strong improvement. This kind of insight helps logistics teams anticipate which terminals will be problematic and plan accordingly, whether that's rerouting, adjusting schedules, or renegotiating with carriers In the view below, users can see which vessels are scheduled to call at each terminal over the next six weeks, providing valuable foresight for effective planning and informed negotiations.

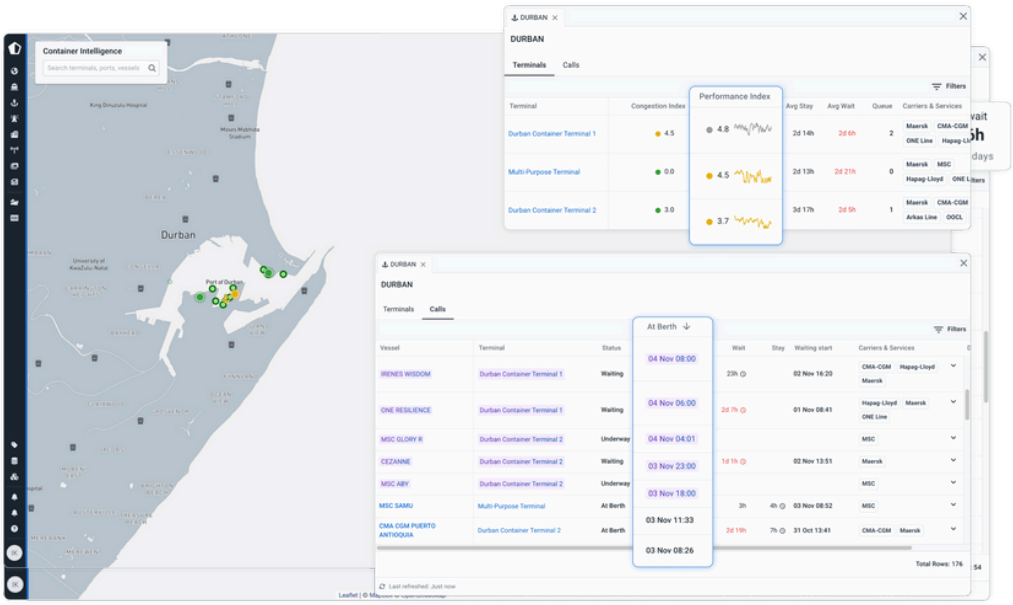


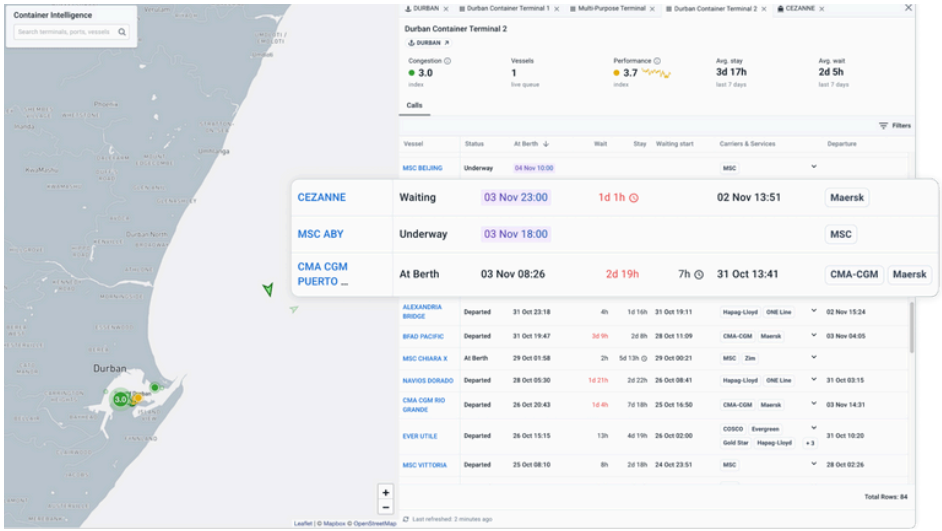
Figure 1

While such analyses provide valuable insights into global port performance and optimization trends, they often overlook terminal-level dynamics, the layer that truly reveals where delays originate and where operational improvements can be made. For this study, we focus on data from Durban, which recorded an average delay of 9.8 days in June, up from 6.9 days in May, as reported in the referenced article. Let's now dive into historical data from that period to explore the insights .

that Kpler's Container Intelligence can uncover At first glance, Kpler's Container Intelligence port-level data indicates only a mild deterioration from May to June:

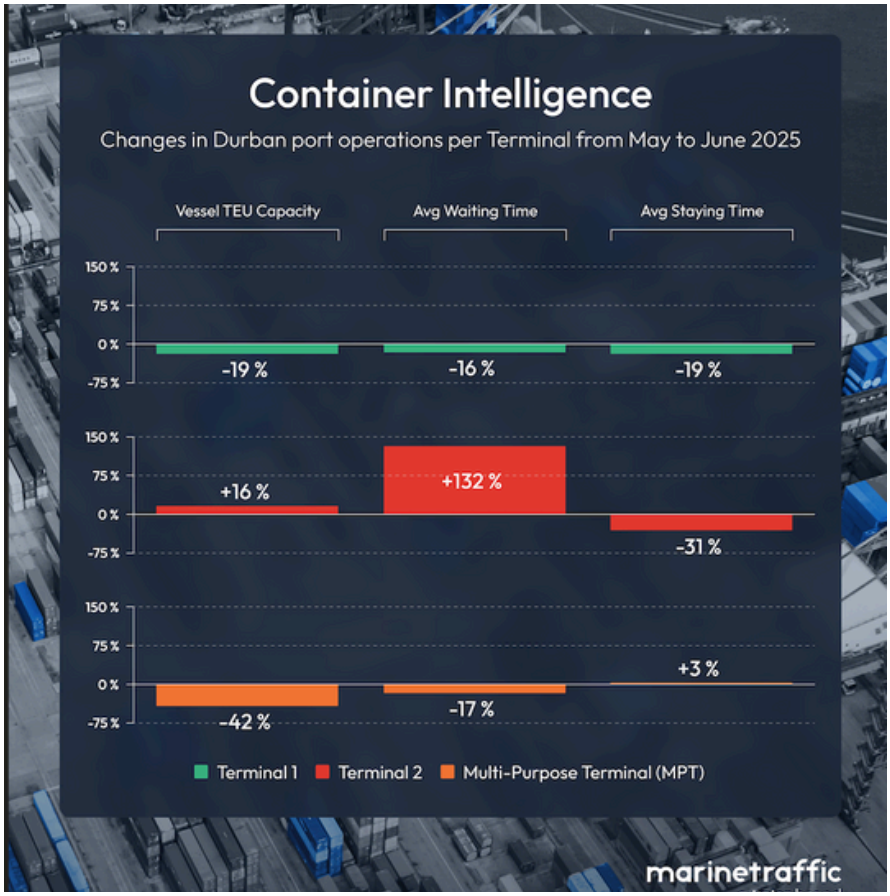
- Vessel calls ↓ 11 % in June
- Total calling TEU capacity ↓4 %
- Share of vessels experiencing waiting ↑ from 93.2 % → 95.8 %
- Average waiting time ↑ 28 % (from 19.7 → 25.3 hours) congestion became more widespread even as total traffic eased slightly
- Average staying time ↓ 22 % (from 63.3 → 49.2 hours) suggesting that terminal operations themselves became more efficient and that the problem lies before berthing, not at the quay.

Although vessel calls decreased and average waiting time increased, the average staying time fell accordingly, balancing the overall turnaround time of container vessels and keeping it roughly in line with the previous month.



DEEP DIVE AT THE TERMINAL LEVEL

What truly reveals the port's operational dynamics is a deep dive into Durban's three terminals. While two terminals experienced shorter delays in june



Terminal 1 improved its operational efficiency. Terminal 2 became the main congestion hotspot. The Multi-Purpose Terminal (MPT) remained constrained by limited capacity.

shorter delays in June, one emerged as the key congestion hotspot, highlighting the limitations of relying solely on port-level data.

By shifting the focus from the port to the terminal level, Container Intelligence uncovers the underlying disparities, identifying which facilities are genuine bottlenecks and which maintain steady performance. This level of visibility empowers users to negotiate more effectively with terminals, monitor in real time which vessels and carriers are being prioritised, and receive early congestion alerts to adjust rotations. It also supports strategic network planning, enables performance benchmarking across terminals, and helps teams understand the root causes of disruptions, so that the right people can make informed operational decisions.

Looking at the data from Kpler's Container Intelligence tool, it becomes evident that the port's average waiting time does not reflect what's happening at each terminal. Terminals 1 and the Multi-Purpose Terminal (MPT) performed relatively well, while real time which vessels and carriers are being prioritised, and receive early congestion alerts to adjust rotations. It also supports strategic network planning, enables For this study, we focus on data from Durban, which recorded an average delay of 9.8 days in June, up from 6.9 days in May, as reported in the referenced article. Let's now dive into historical data from that period to explore the insights that Kpler's Container Intelligence can uncover.

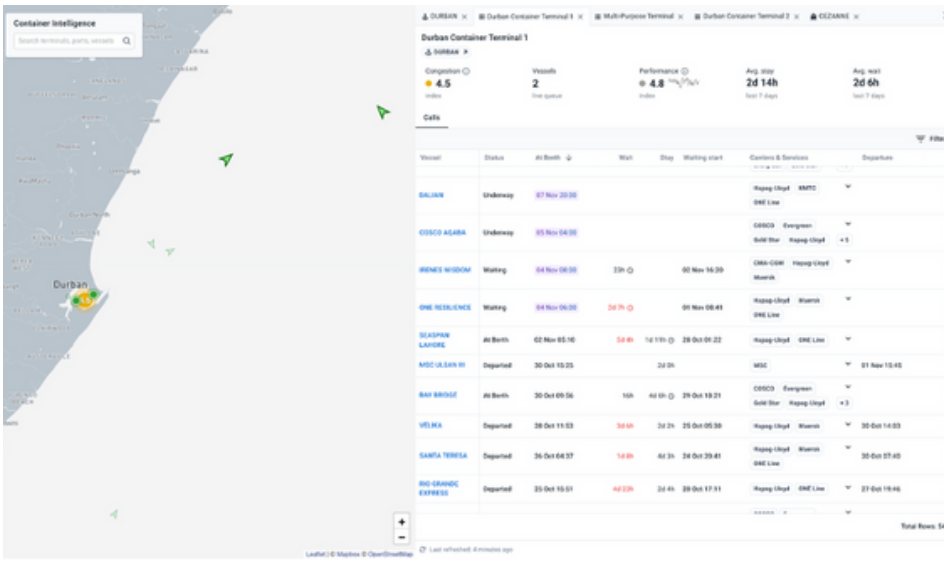
This reassures users that vessels calling at T1 or MPT can expect smoother operations, whereas those scheduled for T2 should anticipate potential delays.

This comparative view clearly demonstrates how Container Intelligence identifies operational imbalances between terminals, providing a far clearer and more actionable picture than port-level metrics alone.

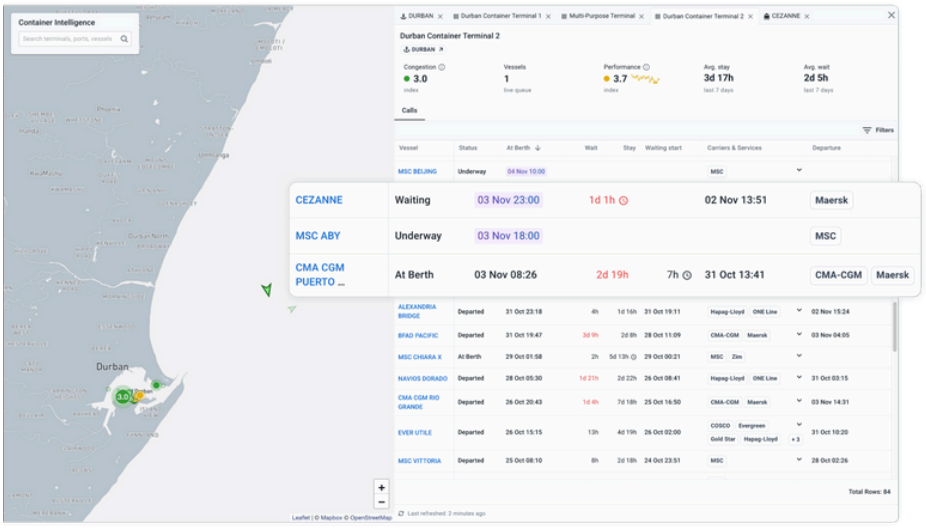
Container Intelligence surfaces these contrasts instantly, pinpointing where real pressure builds. Instead of relying on a single "Durban delay" figure, stakeholders can visualise where and why queues form, laying the groundwork for more targeted berth planning, scheduling, and resource allocation.

Below is a detailed view of the three terminals, showing

exactly what a Container Intelligence user can access. At Terminal 1, users can see vessels currently underway with Durban as their next port of call, along with the carriers and services involved. The platform also displays forecasted vessel arrivals for the next six weeks, those that include Durban in their network even if it's not the immediate next stop, alongside real-time port conditions and the latest weekly averages for stay and waiting times.



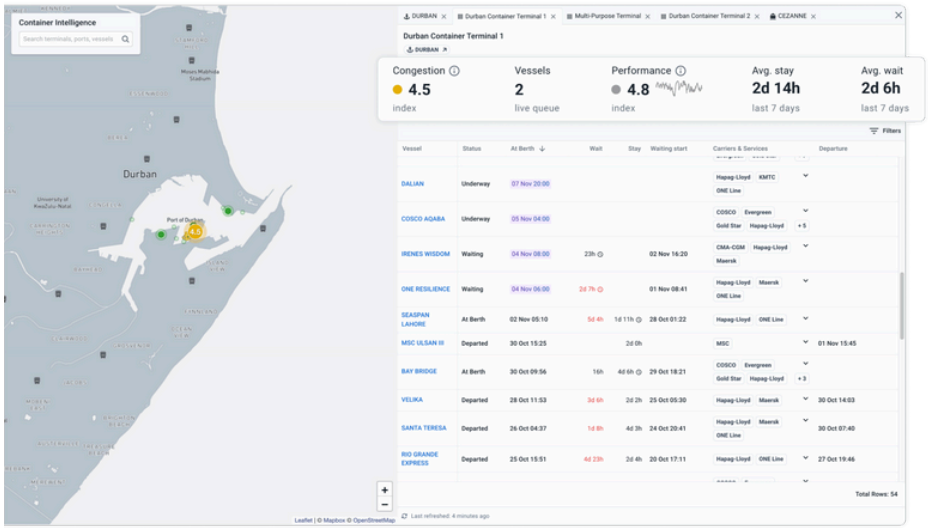
The same level of detail is available for Terminal 2 and the Multi-Purpose Terminal (MPT).

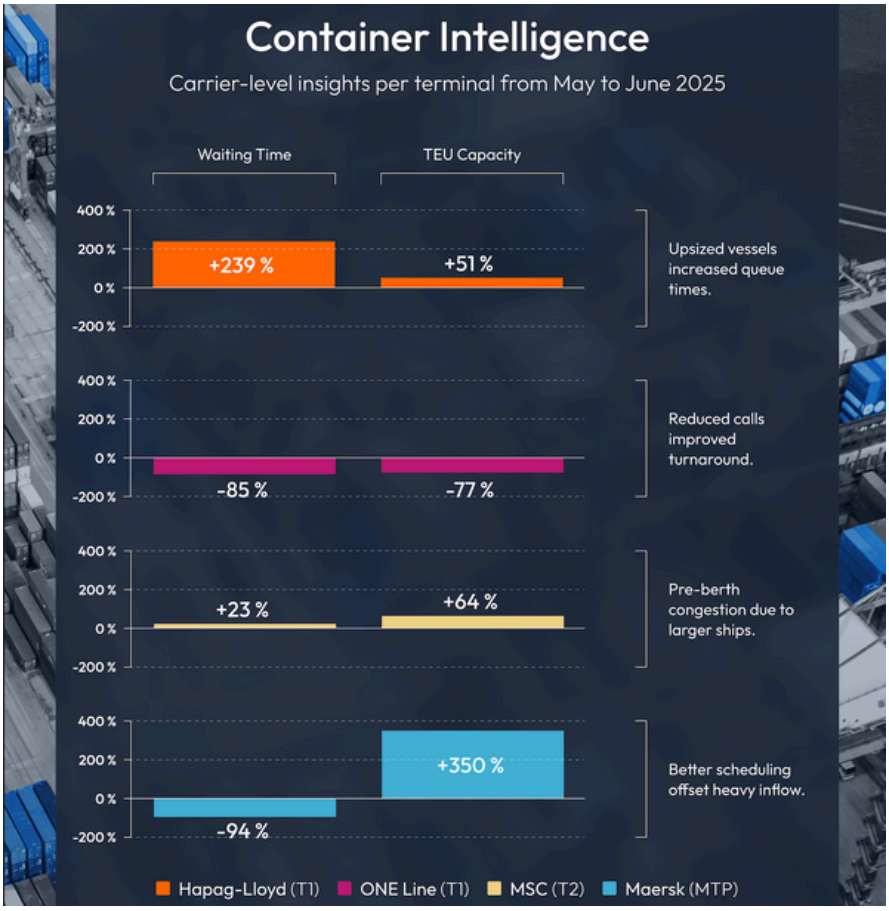


CARRIER-LEVEL INSIGHTS SHOW HOW DEPLOYMENT CHOICES DRIVE OUTCOMES

Container Intelligence quantifies how deployment choices, vessel size, and rotation patterns translate into real-world waiting times, insights that remain invisible in traditional port-level summaries.

With this information, Container Intelligence users can leverage carrier and terminal performance dashboards to give procurement teams the data they need to select and negotiate with the most reliable service providers. By identifying faster carriers and more efficient terminals, users can book smarter, cut costs, improve planning accuracy, differentiate their services, and ultimately win more business.





Terminal 1 improved its operational efficiency. Terminal 2 became the main congestion hotspot. The Multi-Purpose Terminal (MPT) remained constrained by limited capacity.

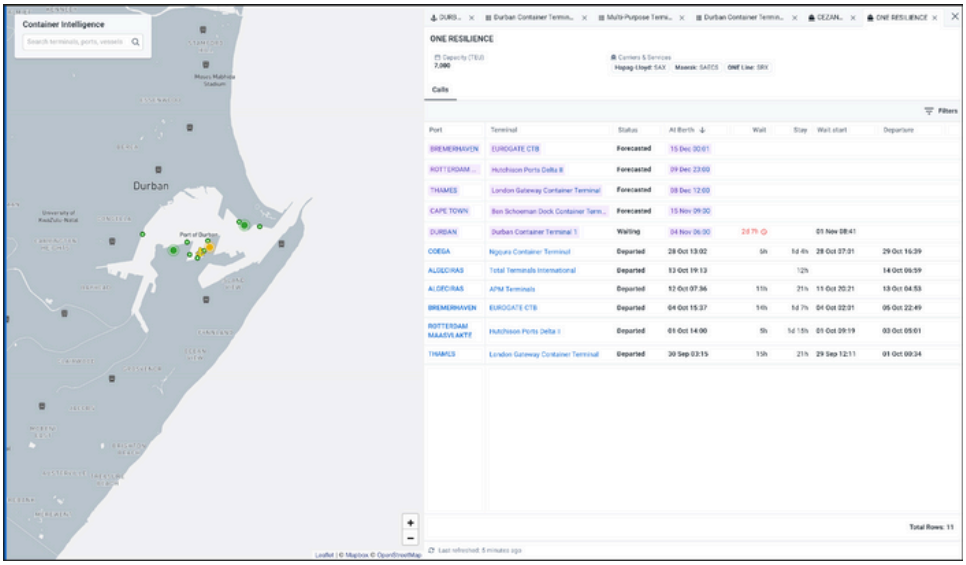
For the analysed period of May–June 2025, Kpler's Container Intelligence tool revealed that even within the same terminal, carrier strategies significantly influenced congestion exposure.

From visibility to action, Container Intelligence empowers users to instantly identify underperforming terminals and benchmark them against 1,800 ports and terminals worldwide.

It enables detailed carrier-level diagnostics to understand how deployment choices amplify or reduce risk, while predictive congestion insights help anticipate bottlenecks before they drive up demurrage and charter costs.

Faster turnarounds also translate into less idle time and lower emissions, directly supporting decarbonisation goals. In short, port-level visibility is history, the new era of operational intelligence is granular, real-time, and comparative, allowing shippers, forwarders, and carriers to act before queues form. MarineTraffic Container Intelligence, part of Kpler's maritime analytics suite, equips stakeholders to anticipate congestion, benchmark performance, and make data-driven, sustainable decisions in an increasingly complex logistics environment.

Next to each terminal call for your vessels, you can view the carriers and services involved, along with their performance and six-week forecasts provided by Kpler's Container Intelligence tool. This gives you a complete operational overview at your fingertips, eliminating the need for constant calls and coordination with your agents, and making day-to-day planning far more efficient.





Supply Chain and Logistics Technology Trends for 2026

London, December 12, 2025 – Middlebank Consulting Group (MCG), a supply chain and value chain management consultancy, today shared its insights on the technology trends set to reshape supply chains in 2026. Founded over 25 years ago in New Zealand, MCG now operates internationally, helping organisations improve performance and reduce costs through technology-driven operational efficiency, process optimisation and scalable supply chain solutions.

"Supply chain teams are facing one of the most unpredictable periods in recent years," said Alan Win, Founder and CEO, Middlebank Consulting Group. "Trade flows are shifting, new technologies are emerging, and customers expect faster, more transparent service. Companies that thrive won't just react, they will experiment, adapt, and sometimes learn the hard way when assumptions don't hold."

Here are eight key technology trends for supply chains in 2026:

1. Smarter Operations with AI
Artificial Intelligence (AI) is moving beyond suggestions; it can act independently in many operational scenarios. Agentic AI systems adjust delivery routes, manage inventory, and flag potential bottlenecks with minimal human intervention.

But here's the catch: these tools are not flawless. Organisations that combine AI insights with practical operational monitoring are expected to see faster, more informed decision-making and improved agility in complex supply chain scenarios.

2. Warehouse Efficiency and Automation
Warehouses are evolving rapidly. Digital twins allow teams to model changes before implementing them, and autonomous robots take over repetitive tasks. That said, people remain essential. Warehouse teams uncover process gaps by questioning automated recommendations and testing tweaks on the ground.

Together, this hybrid approach of human intuition and machine efficiency is expected to enhance accuracy, reduce errors, and improve overall warehouse performance in the year ahead.

3. Choosing Logistics Partners
Selecting the right third- or fourth-party logistics partner will be critical. Experience, technology, and flexibility matter, but the real differentiator will be how partners respond under pressure. Open communication and adaptability are expected to strengthen operational continuity and support more seamless responses to evolving demands.





Alan Win, Founder and CEO of Middlebank Consulting Group

4. E-Commerce Cost Optimisation
Cost reduction is one thing; frictionless customer experience is another. Simple changes like adjusting packaging sizes or optimising pick routes can have ripple effects through operations. These changes are expected to improve both speed and reliability, helping organisations maintain profitability and enhance customer satisfaction.

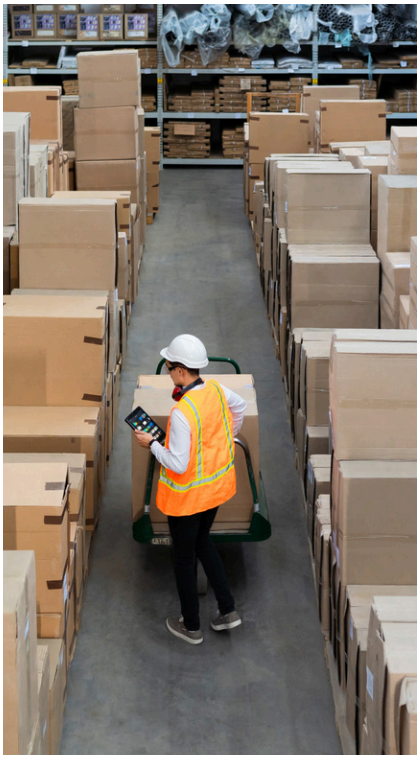
5. Flexible Networks
Dual sourcing, nearshoring, and modular supply chains are no longer optional. Disruptions are inevitable, and the ability to pivot quickly can make the difference between maintaining client trust or losing it. Organisations that prioritise adaptive processes and continuous learning are predicted to strengthen client trust and operational continuity.

6. Sustainability and Circular Supply Chains
Sustainability has moved from a nice-to-have to a must-have. Reducing emissions, cutting energy use, and limiting packaging waste are increasingly tied to performance.
Practical improvements arise from simple steps: smarter routing, greener packaging, and energy-conscious facilities. While no single initiative is transformative alone, collectively they will support sustainable and cost-effective supply chain practices.

7. Workforce Enablement
AI frees teams from repetitive work, allowing them to focus on decisions, coordination, and process improvement. When technology is leveraged as a supportive tool, organisations are likely to see higher engagement, faster problem-solving, and enhanced operational insights that machines alone cannot produce.

8. Transportation and Last-Mile Optimisation
Dynamic routing, real-time tracking, and close collaboration with carriers are transforming delivery. But technology alone is not enough. Human oversight, adjusting plans on the fly and responding to unexpected issues, will remain crucial, especially in complex last-mile scenarios. This combination of technology and on-the-ground decision-making is expected to improve delivery speed and customer satisfaction.

Looking Ahead
Technology provides a competitive edge, but its value depends on people who know how to use it. In 2026, supply chains that blend AI, automation, adaptable teams, and strong partnerships are most likely to succeed. Those willing to experiment, learn from missteps, and adjust in real time will not only react to change but they will shape the future of the industry.



Middlebank CONSULTING GROUP™

About Middlebank Consulting Group (MCG)

Middlebank Consulting Group (MCG) is a leading provider of comprehensive supply chain management services. Founded in 1998 in New Zealand, MCG has been operational in Australia since 2003, in Singapore and India since 2016, in the USA since 2022, and recently in the Middle East. For over 25 years, the company has grown to become a trusted partner for businesses looking to optimise their supply chain operations. With a team boasting over 225 years of collective experience, Middlebank Consulting Group delivers innovative solutions that drive efficiency, reduce costs, and improve overall performance.

THE GREEN CORRIDOR

2026 THE GREEN TRANSITION PICKS UP SPEED

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

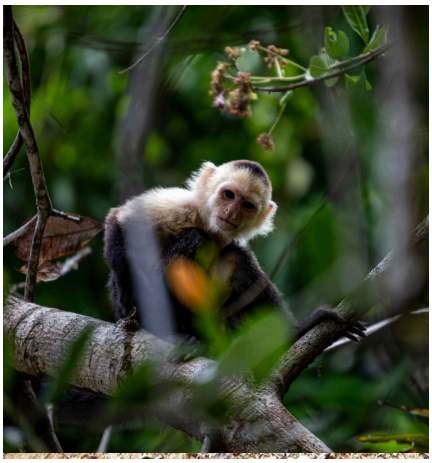
Five years have past since the beginning of LogiSYM's Green Corridor. In those days, 2025 was pegged as a milestone year on most organisations' sustainability roadmaps. Well now that we are all moving past that milestone, how do you feel society has done?

I for one have been surprised by the pace of change in some areas. Here for all of my readers is my summary for the past year and how it measures up against the needs of our planet.

OCEAN FLEETS ADVANCE

The International Monetary Organization (IMO) actually surprised me this year. I've always considered the body as a more reactive international organisation, but this year has proven me wrong. The IMO has moved to enact standards with teeth, and though there are continuing debates about how best to incentivise the transition, the group as a whole has acknowledged that they will speed the transition up.

LNG is achieving more buy-in from carriers as the transitional fuel du jour. No doubt this is having a big impact on reducing voyage emissions. That said, infrastructure will continue to be a challenge for ocean carriers wanting to use new fuels. Ammonia fuelled ships for one have few locations where refuelling infrastructure is available. Major ports are investing though, Rotterdam with established bunkering and



Jurong/Tuas (Singapore), Saldanha Bay (South Africa), Bell Bay (Australia), Japanese hubs, Omani ports well progressed with plans. Ocean ports continue to speed ahead with greening their processes. I visited one of the EV powered vessels in Singapore's port. In a past article this year "Greening the Blue" one can see the amount of innovation taking place in the maritime sector's small vessel arena. From electric passenger ferry services to chandelling services, EV's are moving into replace fossil fuel burning ships. Drones are also still making inroads for offshore emissions free logistics. The innovation and ingenuity of the naval engineers of old seems to be in full force.

AIR INDUSTRY LAGGING BEHIND

There are of course small gains being made to physical aircraft to bring down fuel consumption here and there, but standard improvements which one should expect from a competitive industry is not making large enough gains. Real engineering advances with impact to replace fossil fuels are still missing.

The only real solution left is increasing the use of Sustainable Air Fuel (SAF). In 2025 efforts to use SAF finally kicked off. An SAF 2% blend mandate started in Europe this year. For Asia, only Singapore is committed to do a 1% SAF fuel blend for Singapore originating flights in 2026.

I am hoping that with base demand for SAF now established – real investment and therefore innovation in SAF production can get moving and bring down the costs. 2026 should show some indicators of what technologies and new methods are likely to come into competition for making SAF a more commercially viable fuel verses fossil fuels.

LAND TRANSPORTATION EVOLUTION

EV transportation continues to dominate as the technology that will transform land transportation. What's more, the battery storage costs for electricity has, as predicted, continued to fall.

2025 has indeed seen lower EV prices and increased competition in all vehicle types. As a result, EV sales have increased significantly. China manufacturers have become the leaders, bolstered by a huge and competitive home market. European, Japanese and Korean brands though have worked hard to catch up. Charging infrastructure is still desperately needed though. Southeast Asia, Oceania and Japan all lack enough infrastructure to move markets for land transport into another level of transition. 2026 will hopefully see some significant moves to remedy this.

GREEN POWER

The International Energy Agency (IEA) again shows continued rapid growth of renewable energy and an increased percentage of renewables being used in the energy mix. Wind and Solar power generation are now the undisputed low-cost energy source for the world's energy hunger. The developing world is significantly taking up clean energy technology over traditional fossil fuel technology thanks to this fact. There are also major energy security advantages for clean energy. Of note this year - the noise for nuclear power to significantly start producing energy has gained a lot of attention. I have even seen a paper talking about nuclear applications for ocean carriers. I will expect nuclear power plants for national grids to gain some traction in our region with some real announcements in 2026.

BIODIVERSITY PROTECTION

The Illegal Wildlife Trade (IWT) puts our planet and our children's future at risk by creating imbalances in the planets ecosystems. These imbalances in nature cause higher chances for zoonotic disease creation and exposure. When combined with international transport, the exposure and spreading of these diseases are amplified. The logistics industry is a required supplier for the illegal wildlife trade. So let us see how our industry is doing at spotting and reducing illegal wildlife trade. One report that attempted to sum up global performance in stopping illegal wildlife trade was done by the UNODC in May 2024. It concluded that illegal wildlife trafficking has continued with no significant progress in stopping it for 2 decades. More recent reports on illegal wildlife trade have shown some progress on law enforcement, but also an escalation in selling by smugglers via online channels.

2026 may show that some customs departments get better at profiling suspect imports and therefore increase confiscations of IWT. This year I have I seen reports of this taking place. I will expect more application of profiling automation (likely AI-enhanced) to have impacts in 2026.

SUMMING IT UP

Overall, the progress towards the carbon free future continues to move forward. 2026 shows promise for increased transformation around the globe. This will likely be a good year to increase the pace of transition our region. So with high hopes for a success -> HAPPY GREEN NEW YEAR TO ALL!!



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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Singapore

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