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# REDEFINING THE FUTURE OF GLOBAL CONTAINER SUPPLY CHAINS



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# 1

# Shaping the Future of Container Supply Chains

Global container supply chains are moving into a more measured growth phase. Port throughput grew by about 2.1% in 2025, with a modest 2.4–3.0% recovery expected in 2026. However, 2026 has also seen an increase in regional conflicts, particularly in the Middle East, which connects Europe and Asia trade routes, further impacting global supply chains. The focus is shifting from pure volume growth to supply chain resilience, reliability for their customers, and improving performance. For Beneficial Cargo Owners (BCOs), this creates a practical need and an opportunity to improve cost control, lead-time predictability, and supply flexibility. This uncertainty in the market is forcing cargo owners to rethink their supply chain strategies, particularly in how they collaborate with logistics solutions providers to navigate challenges and maintain operational efficiency.

Based on key discussions at CSC Live 2025, co-located with TOC Europe, this report highlights the main strategic trends shaping container supply chains - including forecasts of maritime trade, assessments of ocean purchasing, fulfilment discussions for specific cargo sectors, digital visibility of the cargo, port infrastructure readiness, case studies featuring proper integration of sustainability into business growth plans and which new technologies can optimise logistics operations. Written for BCO decision-makers, this report converts these market signals into clear planning insights for 2026 and beyond.

## Resilience, predictability and digital visibility are emerging as the new benchmarks for supply chain success in 2026

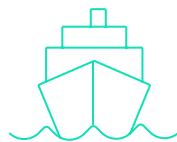
### 2025

#### Supply Chain Performance Highlights

##### (BCO Focused)

- Global throughput +2.1% (UNCTAD)
- Schedule reliability ~60-65% (Sea-Intelligence)
- Colombo +6-7% (Diversion hub)
- Tangier Med +6% (Nearshoring)
- LA-Long Beach +1.5% (Recovery)
- Hamburg & Rotterdam -0.8% to -1.2% (Suez impact)

**Why this works for BCOs:** Focus on routing options, sourcing diversification and reliability impacts, not port rankings



#### Infrastructure & Energy Transition

##### (Impact on Cargo Owners)

- USD 28B invested in 2025 (+12% YoY)
- Focus Area: Shore power, electrification, inland hubs
- Regulation-led decarbonisation push
- Green corridors: Singapore-Shanghai, Rotterdam-Gothenburg

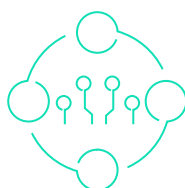
**BCO relevance:** Links sustainability investments directly to freight rates, ESG compliance and carrier selection



#### Digitalisation & Smart Supply Chains

- 45+ terminals using AI optimisation
- Vessel turnaround times cut ~11%
- Shared digital platforms (Visibility and docs)
- Cyber resilience now board-level

**BCO relevance:** Emphasises predictability, visibility and cost avoidance, not terminal efficiency alone



### 2026

#### Outlook & Risk Factors

##### (BCO Decision View)

- Growth outlook +2.4 – 3.0% (Drewry)
- Trade flows stabilising, with route shifts
- Transit times above historical norms
- Freight rates remain dynamic
- Reliability improving but below pre-2020

**BCO relevance:** Direct input into budgeting, contract strategy and inventory planning



#### Regulatory Pressure

##### (Direct BCO Impact)

- EU ETS starts 2026 (EU)
- 60+ ports offering green incentives
- Cleaner fuel mandates tightening toward 2030
- Compliance influencing carrier & contract choice

**BCO relevance:** Focus on landed cost, compliance exposure and inland logistics efficiency



# 2026 marks an important inflection point for the global container supply chain

This report is not a recap of 2025... It is a forward-looking strategic briefing to help decision-makers manage uncertainty, adjust supply chain strategies and plan with greater confidence for 2026 and future growth.

## This report delivers:

- **Emerging Trends** - Reviews 2025 performance across major ocean gateways and shipping trade routes, highlighting differences in cargo volume fluctuations, investment, resilience, and the impact of geopolitical uncertainties and conflicts. It explains where growth is strengthening, where pressures remain, and what this signals for 2026 planning.
- **Preparing for Uncertainty** - Ongoing geopolitical shifts, trade policy changes, climate events and labour dynamics continue to affect lead times, costs and service stability. Discussions at CSC Live 2025 emphasised adaptive planning, flexible network design and risk-aware sourcing strategies for BCOs.
- **Innovation in Practice** - Advanced tools such as AI, predictive analytics and real-time visibility are moving into wider operational use, particularly in Europe. In 2025, 41% of large EU enterprises used AI in supply-chain functions, led by Germany, France and the UK - improving cost control, delivery accuracy and sustainability tracking. AI-based forecasting and warehouse automation are also expanding globally. Startup investment continues, with Treefera raising USD 30 million for AI-driven first-mile visibility.
- **Collaboration & Alignment** - BCOs, carriers and technology providers are working more closely to improve reliability, reduce inefficiencies and strengthen planning. Solutions showcased focus on transparency, workflow efficiency and operational resilience across shipper and logistics networks.
- **TOC Podcast Insights - Trade & Tariffs** - A past 'TOC Talks' episode from April 2025 explored how new U.S. tariff measures were driving cargo surges before deadlines and slowdowns after increasing volatility in shipping patterns. Expert views from Transport Intelligence and the Global Shippers' Forum highlighted trends such as rising nearshoring, regional sourcing, and "China+1" strategies, along with the growing importance of alternative corridors and regional ports. Discussions this year will continue to build on these themes, reflecting the latest industry changes and evolving strategies.

“ Interesting growing event (CSC Live) that I will for sure attend in the future. ”

**James Hookham**

Director



**Get involved - CSC Live and TOC Europe offer a platform for port leaders and cargo owners to tackle 2026 challenges for the maritime supply chain - from regulatory compliance and sustainability to digitalisation and resilience - showcasing AI optimisation, green corridor investments and cross-border collaboration to support data-driven decisions and strategic planning.**

## The Role of the Port in Resilient Maritime Supply Chains

### Trends

- Ports and terminals are focusing on providing added value to their customers through service diversification
- Stronger collaboration across terminals, customers and supply chains
- Rising focus on efficiency, resilience and sustainability

### Challenges

- Infrastructure expansion costs and space constraints
- There needs to be more strategic alignment between ports, BCOs and other logistics stakeholders
- Service diversification requires collaboration with customers and local authorities

### Opportunities

- BCOs prioritising reliability of their cargo flows
- Ports playing a greater role in supply chains and interested in engaging with customers
- Shipping alliances working in tandem with the port to enhance supply chain resilience

### Key Takeaways

- The port plays a pivotal role in supply chain and cargo flows
- Port infrastructure growth focuses on agility and added value, not just size
- Resilience and reliability require stronger coordination across all supply chain actor

## Digital Connectivity and Data-Driven Supply Chains

### Trends

- Real-time data is increasingly used to coordinate shippers, carriers and logistics partners
- Digital tools are moving from siloed systems to shared platforms
- AI use is expanding in forecasting, routing and capacity planning
- Demand for full visibility of the of cargo throughout the supply chain
- Better digital coordination across sea, inland and logistics networks

### Challenges

- Reliable and timely data is critical across multi-model supply chains
- Integrating multiple systems and partners globally remains complex
- Adapting operations while implementing digital tools is a key hurdle
- Lack of visibility and traceability of the cargo across the supply chain

### Opportunities

- Better visibility and more predictable deliveries
- Faster decisions through shared digital platforms
- Improved coordination and risk control across supply networks
- Stronger customer service and supply chain resilience
- Data sharing and standardisation for better decision-making
- Cyber-by-design strategies to strengthen digital resilience

### Key Takeaways

- Connectivity and data are essential for supply chain performance
- Supply chains are becoming integrated, connected networks, not isolated operations
- Access to data is key to enable visibility, efficiency and resilience across supply chains
- Connectivity, collaboration and cybersecurity are critical to keep cargo flows resilient
- Digitalisation can enable and enhance the energy transition across the supply chain

### Event Takeaway:

Supply chain leaders are deploying smart technologies and targeted automation to improve reliability, traceability and resilience. Secure connectivity and cyber-by-design approaches are enabling more predictable, efficient as well as sustainable maritime operations.

### Event Takeaway:

Shippers and logistics providers are investing in digital connectivity to directly improve supply chain performance. Real-time visibility, integrated platforms and standardised data are enabling more accurate forecasting, better asset utilisation and more predictable deliveries across complex, multi-modal networks.

# Defining Success in Supply Chain Operations

## Trends

- Supply chains now face constant obstacles and uncertainty
- Greater attention to supply chain operations and KPIs
- New technologies and start-ups can improve supply chain operations

## Challenges

- Unprecedented volatility and disruptions caused by geopolitical tensions
- Shipping delays and port congestion affecting inventories
- Disruptions and uncertainty lead to more expensive freight rates
- Supply chain actors work in silos and the access to data is uneven

## Opportunities

- Shippers prioritising reliability and customer satisfaction
- Shipping alliances can become integrated with port infrastructure growth
- Diversification of logistics services at ports provides BCOs with more options to choose from
- Integration of AI tools that can forecast potential disruptions and assist with decision-making

## Key Takeaways

- Proper integration of logistics with ports' growth strategies can increase supply chain reliability
- Supply chain diversification can enhance resilience but requires strong partnerships
- Satisfaction of the cargo owner becoming one of the main KPIs
- AI can make supply chains more resilient

# Sustainability in Maritime Sector/Trade: What Matters Now

## Trends

- Net-zero targets by 2050 shaping industry strategy (IMO)
- Growth of green shipping corridors and low-emission routes
- Shift toward low-carbon fuels and renewable energy in ports
- Blended solutions across fuel, vessels, operations and logistics
- Cross-industry collaboration and customer-driven sustainability
- Rising focus on ocean plastic, circular economy and data monitoring

## Challenges

- Shipping remains hard-to-abate (80–90% of global trade)
- Limited availability of clean fuel and port infrastructure
- Alignment gaps between shipping, energy providers and regulators
- Balancing sustainability with profitability
- Funding and scaling ocean cleanup initiatives

## Opportunities

- Early adoption of green fuels and clean energy for differentiation
- Revenue diversification via green infrastructure and energy hubs
- Partnerships with governments, energy firms and non-profits
- Circular economy and sustainability engagement for brand impact
- Novel digital tools can help tracking Scope 3 emissions to support decarbonisation across supply chains

## Key Takeaways

- Cross-industry collaboration is critical for decarbonisation
- Ports play a growing role in energy transition
- LNG and transition fuels enable short-term progress toward green goals
- Early movers gain regulatory readiness and competitive advantage

### Speaking at CSC Live 2025:

**Amy Xue**, Head of Supply Chain, Dishman Carbogen Amcis Europe Ltd

**Christiane Schmidt**, Market Customer Service & Logistics Director, Kellanova (formerly Kellogg Company)



## Event Takeaway:

**Sustainable supply chains require aligned regulation, industry action and customer demand. Cross-sector collaboration and green investment are essential to make decarbonisation commercially viable and operationally sustainable.**

# Innovation Ecosystems Driving Supply Chain Performance

## Trends

- Innovation expanding across the supply chain ecosystem
- AI and analytics improving planning and congestion control
- Greater data standardisation across partners
- Predictive tools supporting better operational planning
- Technology increasingly supporting human decisions

## Challenges

- Data quality and system compatibility gaps
- Legacy systems slow partner integration
- Workforce adoption and process change take time

## Opportunities

- Startup and tech partnerships improving visibility and workflows
- Predictive tools reducing delays and uncertainty
- Analytics supporting ESG and performance tracking
- Human + digital tools improving decisions

## Key Takeaways

- Ecosystem collaboration is a competitive advantage
- Digital tools improve coordination and predictability
- Standardisation enables cross-partner performance
- Technology focus should be outcome-driven

## CSC Live 2025: What You Need to Know at a Glance

Why CSC Live matters, what is changing and where the container supply chain is heading next

- **Ports are Evolving** – from cargo hubs to more connected supply chain nodes
- **Performance now centres on resilience** – with greater visibility and traceability for cargo owners
- **AI is Going Mainstream** – improving planning, forecasting and operations.
- **Collaboration for Sustainable Growth** – Collaboration drives sustainability – cross-supply-chain partnerships support decarbonisation goals.
- **Innovation Drives Competitiveness** – Start-ups and digital tools improve supply chain performance.

## Event Takeaway:

Investing in AI, digital tools and disruptive technologies across terminals and the wider maritime supply chain is driving real efficiency gains. By partnering with or taking stakes in innovative start-ups, ports can boost productivity while unlocking long-term value and new revenue streams, turning technology investment into a strategic competitive advantage.

“The Container Port Performance Index cuts through complexity by measuring what truly matters - ship time in port - using objective AIS and carrier data to show how port efficiency drives costs, competitiveness and jobs.”

### Jan Hoffmann

Global Lead, Maritime Transport & Ports



# 3 Forward-Looking Insights: *Priorities for 2026 and Beyond*

## Megatrends Shaping the Container Supply Chain



1

### New Shipping Trade Lanes, Alliances & Tariffs

- Global trade routes are shifting
- New alliances are forming
- Geopolitical tensions continue to disrupt flows
- Tariffs introduced in 2025 still influence sourcing and routing
- The risk of wider trade fragmentation remains
- Trade fragmentation is becoming structural

2

### AI, Data Management & Cybersecurity

- AI enables smarter decisions
- Data quality drives performance
- Cyber risks continue to rise
- Legacy systems remain vulnerable
- Cyber resilience is now a board-level issue

3

### BCO Procurement Priorities for 2026

- Costs remain under pressure
- Reliability is no longer guaranteed
- BCOs must balance price with service consistency
- Long-term contracts and diversification are gaining importance
- Data-lead procurement is becoming essential

4

### New Measures of Supply Chain Performance

- Cost alone is no longer enough
- Resilience is now a core metric
- Adaptability defines competitive advantage
- Customer expectations drive performance
- Visibility and speed matter more than ever

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### Sectorial Cargo Dynamics

- Each cargo segment faces different realities
- Reefer demand continues to rise
- Energy and project cargo flows are shifting
- Bulk and container overlaps are increasing
- Sector-specific strategies are critical

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### Hinterland Connectivity as a Competitive Advantage

- Hinterland access defines port competitiveness
- Rail and inland waterways gain priority
- Digital coordination improves cargo flow
- Ports with seamless inland links win cargo share

7

### Infrastructure Investments at Ports

- Ports are modernising fast
- Automation improves productivity
- Digital platforms enhance coordination
- Capacity expansion supports growth
- Infrastructure resilience is now strategic

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### Sustainability without Losing Profitability

- Decarbonisation remains unavoidable
- Margins are under pressure
- Efficiency is the bridge between both goals
- Incremental change works better than disruption
- Commercial viability drives adoption

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### Feasibility of Green Corridors

- Green corridors are moving from concept to pilots
- Collaboration is essential
- Fuel availability remains a constraint
- Regulatory alignment is improving
- Scalability is the next challenge

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### Benefits of Innovation and Disruptive Technology

- Innovation improves efficiency
- It strengthens competitiveness
- Customer experience improves
- ROI clarity remains a concern
- Scaling solutions is the key hurdle

“European ports must adapt to the energy transition by diversifying beyond fossil fuels, while continuing to drive long-term growth in containerised cargo - a shift already reshaping ports like Rotterdam.”

**Luuk de Gruijter**

Senior Investments Manager



Lifting Global Trade.  
**APM TERMINALS**

# 4 Introducing CSC Live 2026 - Where the Container Supply Chain Decides What's Next

## CSC Live 2026: Shaping the Future of Container Supply Chains

CSC Live is the premier global event for leaders driving innovation and transformation in container supply chains. It bridges the gap between regional market realities and the broader dynamics of global container trade, with a strong foundation in Europe and a growing influence across Asia and Latin America.

Tailored for senior decision-makers in shipping, ports, terminals, logistics, cargo ownership and technology, CSC Live simplifies the complexities of the industry. The event focuses on what truly matters: enhancing performance, building resilience, leveraging data, and achieving impactful commercial outcomes.

### Why CSC Live Matters Now

In a world of accelerating digitalisation and mounting sustainability pressure, supply chains must adapt fast. CSC Live focuses on the decisive factors for success:

- Changing trade routes
- Resilience and reliability
- AI and cyber security
- Port connectivity
- Decarbonisation
- Data quality

### What You'll Gain

- Clear insights into supply chain performance
- Practical perspectives on AI and cyber resilience
- Executive perspectives on procurement priorities, cost pressure and contract strategy for 2026
- Real examples of port and hinterland strategies
- Conversations on sustainability without sacrificing profitability

### Who Should Attend?

#### Senior level:

- BCOs / Cargo owners
- Shipping lines
- Port and terminal operators
- Logistics and hinterland operators
- Technology and data solution providers



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19-21 May 2026, Hamburg

## Why Attend CSC Live 2026?

- ✓ **Discover cutting-edge tech** shaping future supply chains
- ✓ **Meet key decision-makers** across shipping, ports and logistics
- ✓ **Advance decarbonisation** with practical, scalable solutions
- ✓ **Turn insight into action** across strategy, planning and risk
- ✓ **Form real partnerships** through pilots and co-innovation
- ✓ **Show thought-leadership** via speaking and panels
- ✓ **Stay ahead of regulation** impacting trade and operations



If you influence strategy, investment or procurement, CSC Live 2026 is where the next phase of container supply chains take shape. Find out more at [www.csc-live-event.com](http://www.csc-live-event.com)



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Following its successful debut alongside TOC Europe 2025, CSC Live returns as the essential gathering of senior container supply chain professionals driving maritime trade innovation.

**Hamburg awaits.** At the epicenter of Europe's maritime operations, CSC Live will bring together the decision-makers, innovators, and strategic thinkers who define our industry's trajectory. Discover more about global intermodal logistics, emerging technologies, and the breakthrough startups revolutionising supply chain operations.

**This isn't just another conference** - it's where industry leaders connect with tomorrow's solutions. Where operational challenges meet innovative answers. Where your next strategic partnership begins.

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For more information, visit [www.csc-live-event.com](http://www.csc-live-event.com)

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