



DP WORLD

NAVIGATING THE FUTURE OF MARITIME TRADE

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



WHEN MARITIME NETWORKS ADAPT, TRADE KEEPS MOVING

More than 80% of world merchandise trade by volume is transported by sea. But the networks carrying an estimated \$14 trillion worth of containerised goods are being tested by geopolitical disruption, climate pressures and changing trade policies. 'Navigating the Future of Maritime Trade' examines how global cargo flows are being reshaped, where new trade connections are emerging and why more connected, adaptable corridors are becoming critical to keeping goods moving.

THE SCALE OF MARITIME TRADE AND THE CHANGE AHEAD

Global trade is not retreating. It is being reconfigured. Our whitepaper brings together the data and market shifts defining the next generation of maritime trade.



**MORE
THAN 80%**

of world merchandise trade by volume is transported by sea.



**\$14
TRILLION**

is the estimated value of containerised goods carried through global maritime networks.



94%

of more than 3,500 supply chain and logistics executives expect trade growth in 2026 to match or exceed 2025 levels.



**\$8.8
TRILLION**

in merchandise exports moved between developing economies in 2025—up from approximately \$500 billion in 1995.

THREE PRIORITIES FOR THE NEXT GENERATION OF TRADE

- 1 Build greater route optionality.** Reliance on one established route or gateway increases exposure when disruption occurs. Businesses need viable alternatives that can keep cargo moving as operating conditions change.
- 2 Strengthen regional and global connectivity.** Feeder, coastal and shortsea shipping can connect emerging production centres and regional ports with major international trade lanes, expanding market access and creating greater flexibility.
- 3 Connect smarter, more adaptable networks.** The first generation of global trade connected markets. The next must connect those markets through networks that combine infrastructure, digital intelligence and human expertise.

CONNECTED TRADE CORRIDORS

MORE CHOICE WHEN CONDITIONS CHANGE

Efficiency alone is no longer enough. Businesses need more gateways, more routing options and stronger connections between regional and global markets.



Connected Trade Corridors bring together ports, marine services and inland logistics to create more integrated and adaptable cargo networks. Their purpose is to give customers genuine optionality: the ability to change the physical path of cargo without fragmenting the customer journey.



DP World's Marine Services network already connects more than 200 ports across Northern Europe, the Mediterranean, the Middle East, Africa, Asia and the Americas, supported by a fleet of more than 500 vessels.

TRADE LANES EXPLAINED

ESTABLISHED CORRIDORS

ASIA-EUROPE



Remains one of the world's most strategic trade corridors, but Red Sea disruption has reinforced the importance of alternative routing and greater network flexibility.

ASIA-NORTH AMERICA



The Trans-Pacific remains critical, but sourcing is broadening beyond individual production markets as manufacturing expands across Asia.

INTRA-ASIA



Now a strategic network, driven by regional manufacturing, technology supply chains and growing intra-regional commerce.

TRANSATLANTIC



Remains a major corridor connecting mature consumer and industrial markets across Europe and North America.

FAST-GROWING CORRIDORS

ASIA-LATIN AMERICA



Strengthening as trade in commodities, agricultural products, machinery, automotive goods, electronics and consumer products expands between the regions.

INDIA-MIDDLE EAST-EUROPE



India's expanding manufacturing base and the Gulf's logistics infrastructure are creating the foundations for stronger multimodal connectivity between Asia and Europe.

ASIA-MIDDLE EAST-AFRICA



The Gulf is increasingly acting as an interconnector between Asian production, African growth markets and European demand, supported by maritime gateways, regional distribution and multimodal connectivity.

SOUTH-SOUTH TRADE



A major structural shift. South-South merchandise exports reached approximately **US\$6.8 trillion** in 2025, with around **57%** of developing-country exports now destined for other developing economies.

ALTERNATIVES TO CONVENTIONAL CORRIDORS



MIDDLE / TRANS-CASPIAN CORRIDOR

A growing multimodal connection between China, Central Asia, the Caucasus, Türkiye and Europe, combining rail, sea and road transport.



INDIA-MIDDLE EAST-EUROPE ECONOMIC CORRIDOR

A proposed multimodal ecosystem linking India, the Gulf and Europe through maritime, rail, road and digital infrastructure.



NORTHERN SEA ROUTE

An emerging seasonal option between Northeast Asia and Northern Europe. Strategically significant, but constrained by climate, infrastructure, insurance and geopolitical considerations.

PREPARE FOR WHAT COMES NEXT

THE FUTURE OF MARITIME TRADE IS ALREADY TAKING SHAPE.

Explore the routes, markets and structural forces reshaping global cargo flow and discover how Connected Trade Corridors can help businesses build greater resilience, flexibility and choice.

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THE WHITEPAPER

