FIATA 於米蘭歡慶百週年，正式發布《2026 年市場報告》與《FIATA 恆久遠：領導力傳承》專書

2026 年 10 月 7 日，義大利米蘭 —— 隨著地緣政治動盪持續重塑全球貿易路線，作為全球貨運物流發聲管道的 FIATA（國際貨運代理協會聯合會）呼籲建立更強韌、更具連結性與適應力的供應鏈。在這日益充滿不確定性的貿易環境中，貨運承攬業者將在協助企業度過難關方面扮演核心角色。

此呼籲適逢 FIATA 於米蘭舉行的 2026 年世界大會（FIATA World Congress）歡慶百週年之際。本次大會以「賦能全球物流」（Empowering Global Logistics）為主題，匯聚了貨運承攬與物流專業人士、業界領袖、決策者及國際利害關係人。

荷姆茲海峽（Strait of Hormuz）的動盪突顯了關鍵貿易路線的脆弱性，以及供應鏈具備可行替代方案的必要性。對貨運承攬業者而言，這意味著當既有路線受阻時，必須協調替代路線、運輸模式、出入港口與供應鏈合作夥伴，以確保貨物持續流通。

這一點在《2026 年 FIATA 市場報告：全球趨勢與洞察》（2026 FIATA Market Report: Global Trends and Insights）的研究結果中得到印證。該報告彙整了來自 46 個地區、涵蓋 FIATA 全球四大區域的 111 位貨運承攬與物流專業人士的回饋。報告指出，物流業正逐步適應一個更具不確定性且高度互連的營運環境。地緣政治緊張局勢被列為未來幾年預期影響產業的最重大因素之一，而數位化則持續重塑供應鏈的規劃、管理與連結方式。各個地區的受訪者皆強調了韌性、連結性、法規效率與數據驅動營運日益提升的重要性。

研究結果亦凸顯出業界對貿易走廊多元化與多式聯運連結性的關注日益增加。面對供應鏈中斷風險的攀升，貨運承攬業者正積極尋求開發替代路線選項，強化區域及跨區域連結，並提升跨越不同運輸模式與國界的營運能見度。

總結來說，這些趨勢反映了物流業更廣泛的演進：從優化單一運輸環節，轉向建立具備韌性、連結性與適應力的供應鏈網絡，使其能夠在應對突發狀況的同時，維持貿易的順暢流通。

FIATA 主席 沈建利(Thomas Sim) 教授表示：「《2026 年 FIATA 市場報告》提供了寶貴的全貌，描繪出影響各地區貨運承攬與物流業發展的關鍵因素。研究結果強調了基礎建設、科技、法規效率與連結性的重要性，同時也顯示出業界的優先考量在 FIATA 各區域間存在差異。這些洞察讓我們能更清楚

掌握應在哪些領域投入資源與發展，為支持物流業的持續成長奠定了實用的基礎。」

從動盪走向韌性

當前荷姆茲海峽的動盪說明了為何「韌性」已成為全球供應鏈的戰略重點。維持貿易流通越來越仰賴預測突發狀況、調整營運，以及協調跨運輸模式、走廊與不同司法管轄地之替代解決方案的能力。

《2026 年 FIATA 市場報告》強調，供應鏈韌性不僅仰賴實體基礎設施，也有賴數位連結、通關效率、資料互通與完善的法規制度。這些要素相互配合，有助於打造更可靠、更具應變能力的供應鏈。

對貨運承攬業者而言，這進一步鞏固了其角色的轉變：從過去的運輸安排者，進化為日益複雜之供應鏈的統籌者。透過串聯運輸模式、走廊、科技與利害關係人，貨運承攬業者能協助企業應對突發狀況，同時維持國際貿易的順暢。

FIATA 秘書長 Stéphane Graber 博士表示：「《2026 年 FIATA 市場報告》的研究結果顯示，物流業所面臨的挑戰日益相互交織。地緣政治的不確定性、數位化、基礎建設、複雜的法規以及不斷變化的貿易流向，共同形塑了貨運承攬業者的營運環境。來自全球會員傳達出一個明確訊：建立韌性不能只靠擴充運能，更需要相互連結的基礎建設、具備互通性的數位系統、有效的法規制度，以及供應鏈各環節中更緊密的合作。」

物流業所面臨的挑戰日益相互交織。地緣政治局勢的不確定性、數位化發展、基礎設施建設、法規複雜性，以及貿易流向的變化，都正在形塑貨運承攬業者所處的營運環境。

來自 FIATA 全球會員的回饋傳達出一個明確訊息：要提升供應鏈韌性，不能只靠擴充運能，更需要完善且相互連結的基礎設施、具備互通性的數位系統、有效的法規制度，以及供應鏈各環節之間更緊密的合作。



百年領航：傳承經驗、汲取借鏡、展望未來

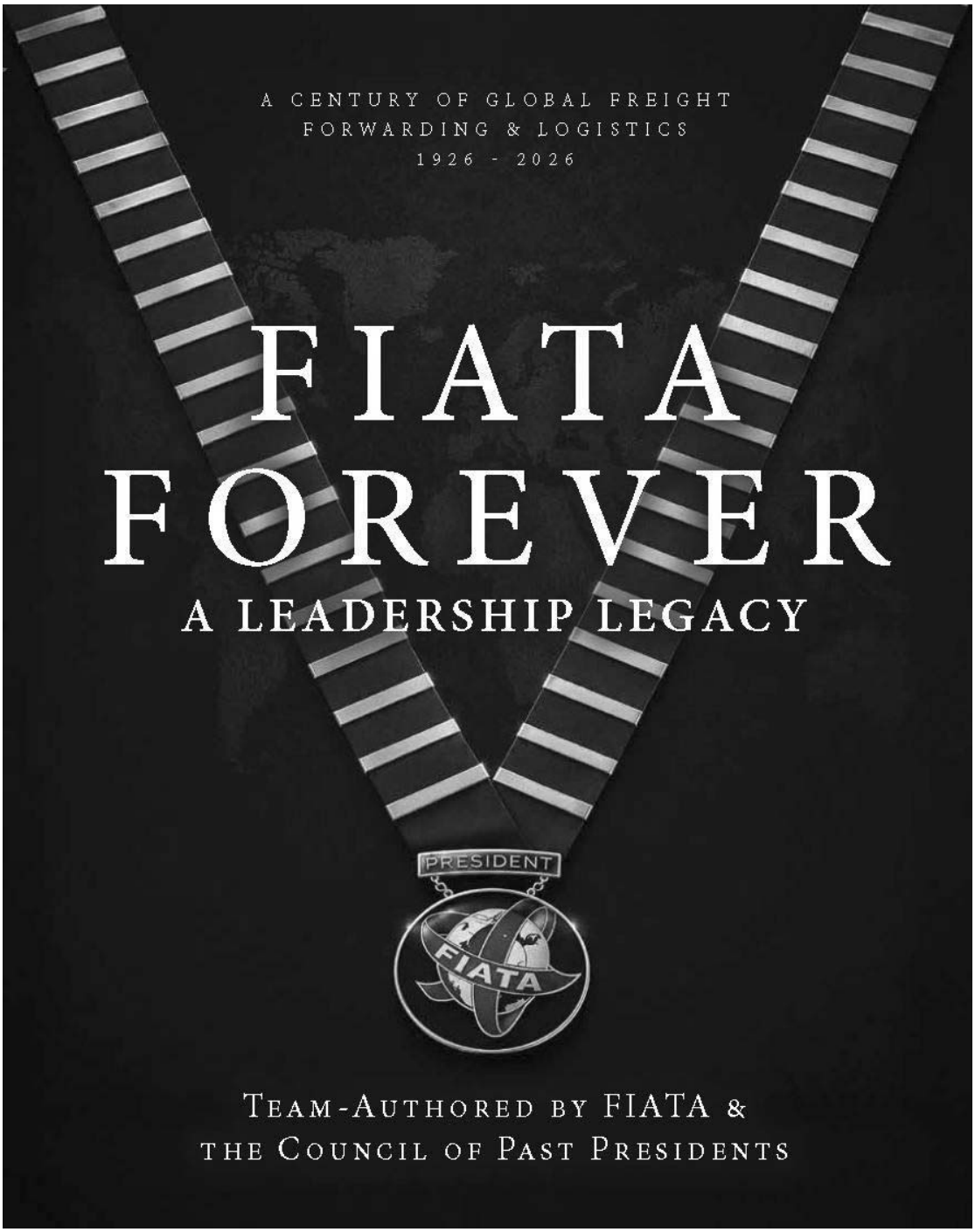
為紀念 FIATA 成立一百週年，特別出版（FIATA Forever: A Leadership Legacy）《FIATA 恆久遠：領導力的世代傳承》一書。記錄全球貨運承攬業界一世紀以來的領導歷程、轉型發展與演進軌跡，。

該書集結了 FIATA 現任主席 Thomas Sim 教授暨博士、16 位仍在世的 FIATA 歷任主席、FIATA 秘書長 Stéphane Graber 博士，以及 12 位代表新世代物流觀點的青年專業人士，共同分享他們的經驗與見解。

《FIATA Forever》透過不同世代 FIATA 領導人的親身經歷與觀點，回顧 FIATA 的發展歷程，以及國際貿易與物流產業所經歷的重大變革。本書深入探討貨運承攬業如何在科技革新、地緣政治局勢變動，以及全球貿易轉型等多重挑戰下，持續演進與發展。

該出版品也搭起連結 FIATA 過去與未來的橋樑。過往領導者的經驗為下一代提供了寶貴的傳承，而年輕專業人士的分享則為未來的機會與挑戰提供了嶄新的視角。

FIATA Forever》於米蘭舉行的 FIATA 世界大會期間發表，作為聯合會成立百週年系列慶祝活動的一環，反映出 FIATA 持續致力於匯聚資深領導層的豐富經驗與下一代的創新理念及抱負，攜手推動國際貨運承攬與物流產業邁向未來。





2026 FIATA MARKET REPORT

GLOBAL TRENDS AND INSIGHTS

FIATA
International Federation of Freight Forwarders Associations
Rue Kléberg 6
1201 Geneva
Switzerland

Ph.: +41 22 715 45 45
info@fiata.org
www.fiata.org

©2026 FIATA International Federation of Freight Forwarders Association

International Federation of Freight Forwarders Associations

The global voice of freight logistics

About the FIATA Market Report

The FIATA Market Report is an annual publication produced by FIATA Headquarters that provides an overview of global market trends. Its aim is to offer insights and interpretations of relevant data and market developments, contributing to a deeper understanding of both regional and global market dynamics.

The report is not intended to be an exhaustive source of information, nor does it claim to represent a universal perspective. Rather, it seeks to provide a fact-based context for discussion at the Congress. Any opinions or interpretations expressed are intended to support reflection and stimulate further discussion and dialogue.

© 2026 FIATA International Federation of Freight Forwarders Associations.

All rights reserved worldwide.

Disclaimer

The 2026 FIATA Market Report has been prepared under the responsibility of the FIATA Headquarters. The information provided herein is non-exhaustive in nature and any opinions expressed do not necessarily reflect the positions or opinions of FIATA or its Members. The information contained herein is not to be construed as providing any professional or legal advice and FIATA accepts no responsibility for the consequences of the use of the information contained in this publication.

CONTENTS

Disclaimer 1
About FIATA 3
Acknowledgements 4
Foreword by FIATA Director General 5
Executive summary 7
FIATA Global Industry Perceptions Survey 2026 9
Comparison to previous FIATA Market Report data 19
Perspectives of Logistics Experts 21
FIATA Assessment 24
Strategic Priorities for the Future of Logistics 25
Conclusion 27

© 2026 FIATA International Federation of Freight Forwarders Associations

About FIATA

FIATA International Federation of Freight Forwarders Associations is a non-governmental, membership-based organisation representing freight forwarders in some 150 territories. FIATA is a reference source on international policies and regulations governing the freight forwarding and logistics industry. FIATA works at the international level to represent service providers who operate in trade logistics and supply chain management. Through its FIATA documents and forms, congress, training and publications, and engagement with relevant international organisations, it promotes trade facilitation and best practices among the freight forwarding community.

Founded in Vienna, Austria, on 1926, FIATA owes its name to its French acronym (Fédération Internationale des Associations de Transitaires et Assimilés) and is known as 'the global voice of freight logistics'. FIATA is headquartered in Geneva, Switzerland.

© 2026 FIATA International Federation of Freight Forwarders Associations

Acknowledgements:

FIATA would like to thank the following individuals for their valuable contributions to the preparation of this report:

- Ms Antonella Teodoro, Senior Transport Consultant, MDS Transmodal Limited
- Mr Turgut Erkeskin, FIATA Immediate Past President
- Dr Stéphane Graber, Director General
- Ms Andrea Tang, Director of Legal and Regulatory Affairs
- Ms Pritha Prasad, Marketing Officer

FIATA also extends its sincere thanks to the FIATA Association Members who participated in the dedicated survey, whose insights and data informed the findings of this report.

FOREWORD BY FIATA DIRECTOR GENERAL



As FIATA celebrates its centenary in 2026, I am pleased to introduce the third edition of the *FIATA Market Report, Global Trends and Insights*. This publication is an important part of FIATA's ongoing commitment to providing its Members and the wider logistics community with relevant, fact-based insights into the forces shaping freight forwarding and international trade.

For 100 years, FIATA has brought together the global freight forwarding community, representing an industry that has continually adapted to changing markets, technologies, regulations and trade patterns. The past century has demonstrated the essential role of freight forwarders in connecting economies and keeping goods moving across borders. Today, that role is evolving once again as the industry responds to a rapidly changing global environment.

The 2026 Market Report examines the trends and developments influencing logistics worldwide. Geopolitical shifts, changing trade flows, supply chain resilience, digitalisation, sustainability and regulatory developments are reshaping how businesses operate and how international trade is conducted. These forces create challenges, but they also present opportunities for freight forwarders to innovate, strengthen their services and contribute to more resilient and efficient supply chains.

FIATA's centenary is an opportunity to look ahead. The industry that FIATA represents today is more connected, technology-driven and globally interdependent than ever before. Freight forwarders, the "Architects of Transport", are increasingly orchestrators of global supply chains, and remain central to navigating this complexity, facilitating trade and creating connections between markets. While uncertainty and successive crisis continue to affect global supply chains, our industry is rapidly transforming, driven by innovation and the adoption of new digital technologies. This report provides a snapshot of the global logistics landscape and highlights the perspectives, developments and opportunities that will influence the years ahead. It also reflects FIATA's role in supporting its Members through advocacy, standards, education, digitalisation and international cooperation.

I invite readers to use the insights presented in this report to deepen their understanding of the changing logistics environment and to consider what these developments mean for the future of our industry. As FIATA begins its second century, one constant remains: the strength of FIATA's global network. We therefore look for collaboration, knowledge-sharing and a shared commitment to innovation as the essential building blocks for a resilient, sustainable and inclusive global trading system.

As we celebrate 100 years of FIATA, we look forward with confidence to the next chapter and to the opportunities that lie ahead for our industry.

Dr Stéphane Graber
FIATA Director General

© 2026 FIATA International Federation of Freight Forwarders Associations



EXECUTIVE SUMMARY

The FIATA Global Perceptions Survey is FIATA's annual survey of freight forwarders and logistics professionals, designed to capture industry perspectives on the opportunities, challenges and trends shaping global logistics. Conducted in preparation for the 2026 FIATA World Congress in Milan and coinciding with FIATA's centennial year, the survey received 111 responses from 46 territories across all four FIATA Regions: Africa and the Middle East (RAME), the Americas (RAMS), Asia-Pacific (RAP) and Europe (REU). As the first edition to include all four regions simultaneously, it establishes a valuable global benchmark for future surveys.

The results reaffirm the critical role of logistics in supporting trade, employment and economic growth. At the same time, they reveal a persistent gap between the recognised importance of the sector and the level of support available to it. Infrastructure, investment conditions, regulations, customs procedures and administrative complexity continue to be significant concerns, highlighting the need for both physical infrastructure development and more efficient regulatory frameworks.

Digitalisation emerges as one of the defining themes. Technology, automation and artificial intelligence are consistently identified as key drivers of future competitiveness, while policies supporting innovation and modernisation receive more modest assessments. This suggests that the industry's digital transformation is progressing faster than the policy frameworks intended to support it.

Viewed together with previous editions of the survey, the results suggest an evolution from concerns centred on logistics capacity and infrastructure towards a broader focus on resilience, digital transformation and the ability to operate in an increasingly uncertain geopolitical environment.

Looking ahead, geopolitical tensions and digitalisation are expected to be among the most influential forces shaping logistics. Geopolitical developments are projected to have a particularly strong impact in Europe and Asia-Pacific, while e-commerce remains a major driver of change in the Americas and Africa and the Middle East. Together, these findings point to a sector adapting to a more uncertain and rapidly evolving operating environment.

The survey findings closely align with the priorities reflected in the FIATA Centennial Declaration on the Future of Logistics, to be launched at the 2026FIATA World Congress. They reinforce the growing importance of digital interoperability, resilient supply chains and multimodal connectivity. As global trade continues to adapt to geopolitical uncertainty and technological change, digitalisation and diversified transport corridors are increasingly viewed as practical tools for strengthening resilience, facilitating trade and supporting sustainable economic development.

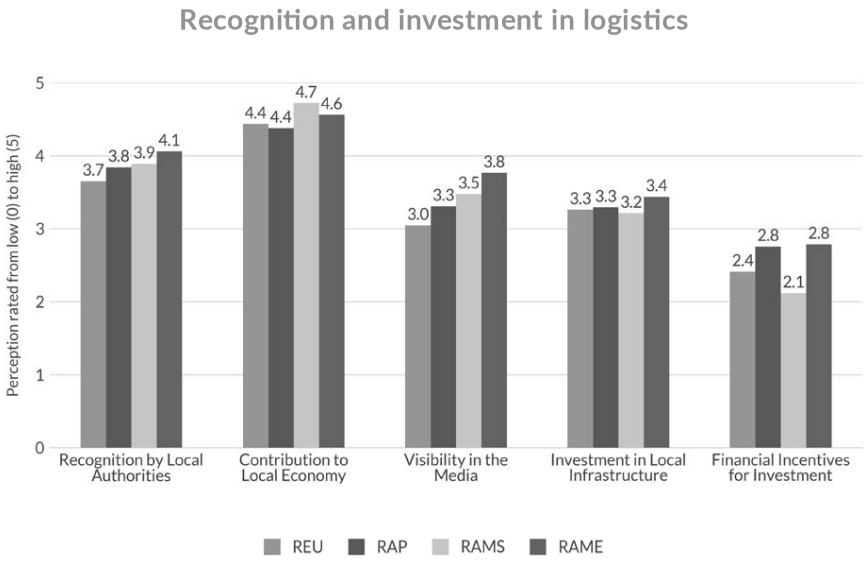
As FIATA enters its second century, the survey highlights the importance of continued cooperation between industry, governments and international organisations in building a logistics sector that is more efficient, resilient, interconnected and prepared for the challenges and opportunities ahead.

© 2026 FIATA International Federation of Freight Forwarders Associations

FIATA GLOBAL INDUSTRY PERCEPTIONS SURVEY 2026

In view of the 2026 FIATA World Congress in Milan, Italy, FIATA circulated a survey amongst its global membership to assess their perspectives on various aspects of the logistics sector, in their respective regions. The survey asked respondents to rate from 0 to 5 (0 being the lowest and 5 being the highest) a range of factors to understand their real-world perceptions of the logistics industry in the region. FIATA received 111 responses, representing 46 territories globally, across all four FIATA Regions: Africa and the Middle East (RAME), Americas (RAMS), Asia-Pacific (RAP), and Europe.





The most notable finding is the strong perception of logistics as a contributor to the local economy across all four regions. This suggests broad recognition of the sector's role as an enabler of trade, employment, competitiveness and economic growth, and reflects the sector's essential role in supporting trade, employment and economic activity.

At the other end of the scale, financial incentives for investment are consistently the weakest area, particularly in RAMS and REU. This may indicate a gap between the acknowledged importance of logistics and the level of direct policy support available to encourage investment, expansion and modernisation within the sector. The consistency of this finding across regions suggests that while infrastructure programmes and policy priorities vary considerably from market to market, respondents broadly perceive a lack of targeted measures to encourage logistics sector investment, innovation and capacity expansion.

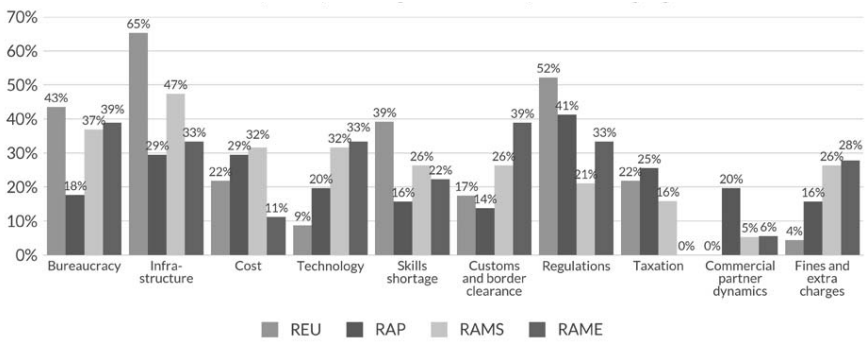
Recognition by local authorities and media visibility vary more noticeably between regions, with RAME generally showing stronger perceptions in these areas. This may be linked to the strategic importance given to logistics and connectivity in a number of territories across the region, where logistics is increasingly viewed as a pillar of broader economic diversification and development strategies. Notably, a gap exists between the sector's perceived economic contribution and the level of recognition it receives from policymakers and the wider public.

Infrastructure investment sits relatively close across all four regions, suggesting a broadly shared perception that investment exists but may not always keep pace with the needs and expectations of the logistics sector. This reinforces the importance of complementing physical infrastructure investment with "soft" investment measures, such as regulatory simplification, digitalisation, trade facilitation and improved coordination between public and private stakeholders, which can enhance performance and maximise the utilisation of existing infrastructure.

Taken together, the findings reveal a notable degree of consistency across FIATA regions. While differences exist in perception of recognition, visibility and support measures, respondents broadly share the view that logistics is a critical economic enabler whose full potential depends not only on physical infrastructure investment, but also on supportive policy frameworks, efficient regulation and greater recognition of the sector's strategic role.

© 2026 FIATA International Federation of Freight Forwarders Associations

Primary challenges faced locally when doing logistics



There are notable regional differences in the primary challenges faced locally when doing logistics.

Region	Primary Challenge Faced (1)	Primary Challenge Faced (2)
RAME	Bureaucracy (39%) / Customs and Border Clearance (39%)	Regulations (33%) / Technology (33%) / Infrastructure (33%)
RAMS	Infrastructure (47%)	Bureaucracy (37%)
RAP	Regulations (41%)	Cost (29%) / Infrastructure (29%)
REU	Infrastructure (65%)	Regulations (52%)

Table 1 - Highest-scoring primary challenges faced locally when conducting logistics activities by Region.

The results indicate that infrastructure represents a common challenge across all four regions, appearing among the two most frequently identified areas in each case. This is particularly evident in REU (65%) and RAMS (47%), where infrastructure emerges as the single most significant challenge. The findings suggest that, regardless of regional context, respondents continue to see infrastructure as a key factor affecting logistics performance and connectivity.

Regulatory and administrative challenges are also prominent across regions. Regulations rank among the leading concerns in REU (52%), RAP (41%) and RAME (33%), while bureaucracy and customs and border clearance feature especially strongly in RAME. Taken together, these findings indicate that logistics challenges are not limited to physical infrastructure, but also extend to the complexity and efficiency of the regulatory and administrative environment in which logistics activities take place.

The results further highlight notable regional differences in the nature of the constraints faced. In RAMS and REU, respondents place greater emphasis on infrastructure-related challenges, whereas in RAME operational and procedural barriers such as bureaucracy and customs clearance are more prominent. RAP presents a somewhat different profile, with regulations emerging as the leading challenge, followed by cost and infrastructure considerations. These differences may reflect variations in cross-border procedures, regulatory frameworks and the structure of regional supply chains.

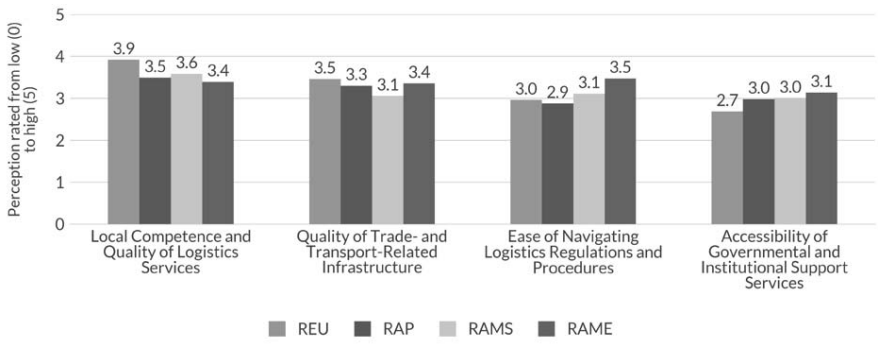
The absence of certain factors among the highest-ranked challenges is also noteworthy. For example, taxation does not emerge as a leading concern in RAME, where respondents place greater emphasis on operational and administrative barriers such as bureaucracy, customs and border clearance, and regulations. Similarly, commercial partner dynamics do not feature among the principal challenges identified in REU. This may suggest that respondents are primarily concerned with systemic factors affecting logistics performance, reinforcing the importance of policy, infrastructure and trade-facilitation measures in improving logistics performance.

Overall, the findings suggest that improving logistics performance requires a balanced approach. While continued investment in infrastructure remains important, the results also point to significant opportunities to enhance efficiency through regulatory simplification, trade facilitation measures, customs modernisation and greater digitalisation of administrative processes.



© 2026 FIATA International Federation of Freight Forwarders Associations

Ease of doing logistics



Perceptions regarding the ease of doing logistics are relatively comparable across the four regions. Local competence and service quality receive the highest scores overall, particularly in REU (3.9) and RAMS (3.6), indicating a generally positive perception of local logistics capabilities and expertise.

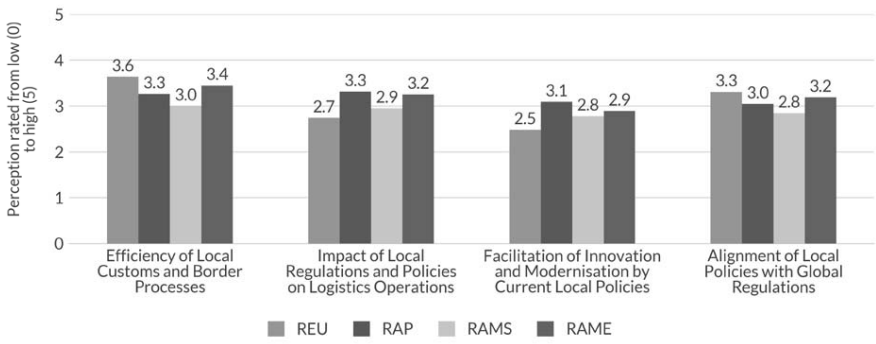
In contrast, ease of navigating logistics and accessibility of government tend to receive lower scores, especially in RAP and REU, respectively. By contrast, respondents in RAME report comparatively stronger perceptions in both areas, recording the highest scores for ease of navigating logistics (3.5) and government accessibility (3.1).

A notable observation is that local competence and quality are consistently rated more positively than the wider operating environment. This suggests that logistics professionals and service providers are generally viewed as capable of delivering high-quality services despite the operational, regulatory and administrative challenges identified elsewhere in the survey.

The comparatively lower scores for government accessibility and ease of navigation also align with the findings on bureaucracy, customs procedures and regulatory complexity highlighted in the previous section. This may indicate that many of the challenges affecting logistics performance are systemic rather than capability-related, pointing to opportunities for improvement through greater administrative efficiency, regulatory simplification and stronger public-private engagement.

Overall, the results suggest that while the logistics sector benefits from strong professional expertise across all regions, improving the ease of doing logistics may depend increasingly on streamlining processes, enhancing regulatory coordination and making interactions with public authorities more accessible and predictable.

Evaluation of local logistics factors



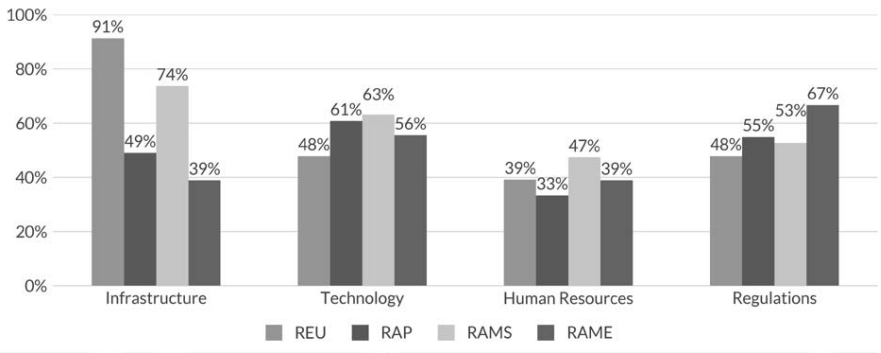
The results indicate that the efficiency of local customs and border processes receive relatively positive evaluations across all regions, with scores ranging from 3.0 in RAMS to 3.6 in REU. This suggests a broadly moderate to positive perception of day-to-day border and customs operations, despite customs and border clearance being identified as a key challenge in certain regions, particularly RAME. This may indicate that respondents distinguish between the overall functioning of customs processes and the administrative complexities that can arise in practice.

In contrast, facilitation of innovation and modernisation by current local policies receives the lowest overall scores, particularly in REU (2.5) and RAMS (2.8). This suggests a common perception that policy and regulatory frameworks may not be evolving at the same pace as technological and operational developments within the logistics sector. The relatively stronger assessment of customs and border processes compared with the facilitation of innovation and modernisation may suggest that authorities may have made some progress in improving traditional trade procedures, while policy frameworks supporting emerging technologies and new business models have not advanced at the same pace.

Notably, variations between regions remain relatively limited, with no single factor or region outperforming or underperforming the others. This suggests that the regions face the same fundamental challenges and that the issues confronting the logistics industry are not isolated to specific territories, but are increasingly systemic and global in nature. This points to a shared need for global regulatory approaches to evolve in step with the pace of technological advancement, rather than relying solely on region-specific solutions. As logistics continues to digitalise and adopt new technologies, enabling regulatory environments may become an increasingly important factor in supporting competitiveness, efficiency and resilience.

© 2026 FIATA International Federation of Freight Forwarders Associations

Areas requiring most development in logistics



Infrastructure emerges as the most critical area for improvement in REU, where 91% of respondents identified it as a priority, significantly higher than any other region. This indicates that infrastructure remains a major concern despite the region's comparatively mature logistics networks and operating environment. Infrastructure also scores prominently in the other regions, reinforcing its importance as a foundational requirement for efficient logistics operations.

Technology is identified as the primary development need in the RAMS with 63% of respondents pointing to it, followed closely by RAP at 61%. This highlights the growing importance of digital transformation, automation and technology-enabled logistics services across these regions. The results suggest that respondents increasingly view technology as a key enabler of efficiency, visibility and competitiveness within supply chains, particularly as logistics networks become more complex and customer expectations continue to evolve.

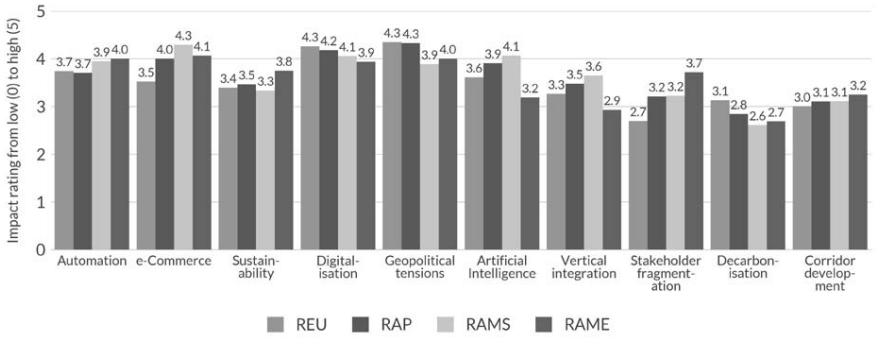
Interestingly, although technology is still considered an important area for development in REU (48%), it ranks well below infrastructure. This may suggest that respondents perceive greater gains from addressing infrastructure constraints before pursuing further technological advancement. More broadly, the results indicate that technology and infrastructure should not be viewed as separate priorities, as digital solutions are often most effective when supported by reliable and efficient physical networks.

Human resources receive comparatively lower scores across all regions, ranging from 33% in RAP to 47% in RAMS. This suggests that workforce-related challenges may not currently be perceived as the most pressing bottleneck for the logistics industry when compared with infrastructure, technology or regulatory constraints. However, the relatively higher score in RAMS may indicate that skills, workforce capacity and training remain important considerations in some markets.

Regulations stand out as the most significant development challenge for RAME, with 67% of respondents indicating a need for improvement, strongly suggesting that regulatory complexity, bureaucracy, and lack of harmonisation are the primary barriers to doing business in this region. The result suggests that regulatory efficiency and greater harmonisation may be important enablers of logistics performance. While regulations receive lower scores in the other regions, they remain a significant concern, indicating that the regulatory environment continues to influence logistics competitiveness globally.

Overall, respondents consistently identify a need to improve both physical and institutional conditions for logistics. This suggests that sustainable improvements in logistics performance will depend not only on investment in infrastructure and technology, but also on regulatory modernisation, skills development and better integration between physical and digital systems.

Projected impact of key factors in the local logistics industry in 2026



Region	Top key projected impact of key factors on the local logistics industry (1)	Top key projected impact of key factors on the local logistics industry (2)
RAME	e-Commerce (4.3)	Geopolitical tensions (4.0) / Automation (4.0)
RAMS	e-Commerce (4.3)	Digitalisation (4.1) / Artificial Intelligence (4.1)
RAP	Geopolitical Tensions (4.3)	Digitalisation (4.2)
REU	Geopolitical Tensions (4.3)	Digitalisation (4.3)

Table 2 - Top two projected impact of key factors on the local logistics industry in 2026 by region

© 2026 FIATA International Federation of Freight Forwarders Associations

The results suggest a clear distinction between the factors expected to shape the logistics industry in different regions.

Geopolitical tensions emerge as one of the most significant factors expected to impact the logistics industry in 2026, ranking among the top projected influences in RAME, RAP and REU. In both RAP and REU, geopolitical tensions receive the highest score (4.3), while respondents in RAME also assign them a high level of importance (4.0). This reflects growing awareness of the extent to which conflicts, trade disruptions, sanctions, shifting trade relationships and supply chain uncertainty influence logistics operations and strategic planning.

Digitalisation is also identified as a major driver of change, ranking among the top projected impacts in RAMS, RAP and REU. Respondents appear to view digitalisation as an increasingly important enabler of efficiency, visibility and resilience across supply chains. The strong ratings across multiple regions suggest that digital transformation is no longer viewed as a future trend but rather as an ongoing and necessary component of logistics competitiveness.

E-commerce is projected to have the greatest impact in RAME and RAMS, where it receives the highest score (4.3). This highlights the continuing importance of changing consumer behaviour and growing demand for faster, more flexible delivery services. The results suggest that logistics providers increasingly need to adapt their networks, fulfilment capabilities and technology systems to support growing e-commerce volumes and customer expectations.

Regional differences are also evident. While RAP and REU identify geopolitical tensions and digitalisation as the two most significant future influences, RAME places greater emphasis on e-commerce, automation and geopolitical developments. RAMS similarly prioritises e-commerce, alongside digitalisation and artificial intelligence. This may indicate differences in regional market priorities, while also highlighting several common themes affecting the industry globally.

Overall, the findings suggest that the future logistics landscape will be shaped by a combination of external pressures and technological transformation. Geopolitical uncertainty is expected to remain an important influence on supply chains, while digitalisation, artificial intelligence, automation and e-commerce continue to reshape how logistics services are planned and delivered.

A notable observation is that the highest-ranked factors are largely external or transformational in nature. Unlike infrastructure, regulation or workforce development, which reflect existing operational conditions, geopolitical tensions, digitalisation, artificial intelligence and e-commerce point to broader forces that are reshaping the logistics industry itself. This suggests that respondents are looking beyond current challenges and increasingly focusing on the structural trends that will define competitiveness and resilience in the years ahead.



© 2026 FIATA International Federation of Freight Forwarders Associations

COMPARISON TO PREVIOUS FIATA MARKET REPORT DATA



Comparisons with previous FIATA Market Reports reveal both continuity and recurring gaps in the perceived enabling environment for logistics.

Note on comparability: *The 2024 and 2025 FIATA Market Reports included regional perception surveys focused on the host regions of the FIATA World Congress, namely RAMS and RAP respectively. As the 2026 survey expands the analysis across all four FIATA Regions, direct year-on-year comparisons are only possible for RAMS and RAP. Consequently, observations relating to RAME and REU should be interpreted as baseline findings for future editions of the survey.*

Region Americas (RAMS): Infrastructure challenges persist as digital transformation accelerates

In Region Americas, the 2026 RAMS results reinforce the findings of the 2024 FIATA Market Report: Global Trends and Regional Spotlight on Latin America. One of the strongest continuities from 2024 is the recognition of logistics as an important contributor to economic development. In both surveys, respondents view logistics as strategically important to the economy, yet continue to report relatively weak perceptions regarding financial incentives and policy support for investment. This suggests that the gap identified in 2024 between recognition of the sector's importance and tangible support measures remains largely unchanged.

Infrastructure also remains a recurring theme. In the 2024 survey, respondents were almost unanimous on the need for additional infrastructure investment, and infrastructure was identified as a key operational challenge. In 2026, infrastructure continues to rank as the principal challenge faced locally (47%) and remains one of the major areas requiring development.

However, the most interesting evolution is the growing prominence of technology. In 2024, technology appeared primarily as an area requiring investment alongside infrastructure and human resources. By 2026, technology is no longer simply a supporting requirement. It has become central to respondents' view of the industry's future. Technology is identified as the leading development priority (63%), while digitalisation and artificial intelligence emerge among the highest-rated projected impacts on the sector. This suggests a shift in focus from building logistics capacity to transforming logistics capability. Whereas the 2024 survey reflected concerns about foundational investments and infrastructure deficits, the 2026 survey indicates that respondents increasingly see competitiveness, efficiency and future growth as dependent on digitalisation, data-driven operations and automation.

Another interesting observation is that bureaucracy remains among the most significant local challenges in both periods. This may suggest that physical infrastructure investment alone is insufficient and that administrative processes continue to constrain logistics performance despite ongoing improvements elsewhere.

Region Asia-Pacific (RAP): Digitalisation remains central as geopolitical concerns rise

In Asia-Pacific, the 2025 FIATA Market Report: Global Trends and Regional Spotlight on Asia-Pacific placed considerable emphasis on digitalisation, innovation, multimodal connectivity, sustainability and resilience. Digital transformation was presented as a key enabler of future logistics performance and competitiveness. This perception is strongly reinforced by the 2026 findings, in which digitalisation remains one of the most highly ranked future impacts (4.2), while technology is identified as one of the principal development priorities (61%). This continuity suggests that digital transformation remains a central strategic objective across the region rather than a short-term trend.

The most striking change since 2025 has been the emergence of geopolitical tensions as the highest-rated projected impact factor (4.3) in the 2026 findings. Although resilience featured strongly in the 2025 report, the 2026 survey suggests that respondents increasingly view geopolitical uncertainty as a direct operational concern rather than simply a strategic risk. In practical terms, this implies a growing focus on supply chain resilience, alternative routing, diversification of sourcing and greater operational flexibility.

Another notable observation is the contrast between current and future challenges. In the 2026 survey, regulations are the primary challenge currently faced by the industry (41%), technology is the leading area requiring development (61%), and digitalisation and geopolitical tensions are expected to have the greatest future impact. Taken together, these findings suggest that respondents see the future direction of logistics relatively clearly but believe that existing regulatory and operating environments may not yet be fully aligned with that future. This is particularly interesting because it mirrors one of the core themes running through the 2025 report: the need to align policy, investment and technology to support resilient and modern supply chains.

© 2026 FIATA International Federation of Freight Forwarders Associations

PERSPECTIVES OF LOGISTICS EXPERTS

Across all regions, the survey points to three interconnected priorities for the future of logistics: digitalisation, resilience and connectivity. These themes are reflected throughout the results and align closely with the principles contained in the FIATA Centennial Declaration on the Future of Logistics.

Comments from Turgut Erkeskin, FIATA Immediate Past President

The results of the FIATA Global Perceptions Survey reflect clearly the transformation our industry is experiencing. Logistics is increasingly recognised as a strategic contributor to national economies and global trade, but this recognition is not always matched by the infrastructure, regulatory frameworks and investment environment required for the sector to perform at its full potential. The relatively weak assessment of financial incentives for investment underlines this gap.

What strikes me most is that many of the challenges are shared across regions, even if their intensity differs. Infrastructure, regulation, customs and administrative processes remain important concerns. At the same time, geopolitical tensions, digitalisation, artificial intelligence and changing trade patterns are reshaping how supply chains are designed and managed. Respondents in Europe and Asia-Pacific expect geopolitical tensions to have a particularly strong impact, while digitalisation also ranks among their highest-impact factors. The prominence of e-commerce, particularly in the Americas and Africa and the Middle East, further underlines the demand for more responsive and transparent logistics services.

For many years, supply chains were primarily designed around cost and efficiency. Today, resilience and optionality have become equally important. Companies need viable alternatives to a single route, gateway or sourcing strategy. This is why the development of alternative and complementary trade corridors has become so important. Corridors should be viewed as strategic networks connecting infrastructure, customs, digital systems, regulations and logistics services. In an uncertain geopolitical environment, alternative corridors provide global trade with the flexibility it increasingly requires.

Digitalisation is the other major transformation. The objective should be to create an environment in which trusted data can move seamlessly between the different actors in the supply chain. Electronic transport documents, interoperable platforms and internationally recognised digital standards can reduce administrative complexity while improving visibility, efficiency and resilience. The survey is particularly relevant in this respect, as policies supporting innovation and modernisation received relatively modest assessments across the regions.



However, technology alone will not solve the industry's challenges. Physical infrastructure, digital infrastructure and regulatory frameworks must develop together. A digitally enabled supply chain cannot achieve its potential if cargo is delayed by inadequate infrastructure, fragmented regulations or inefficient border procedures. Investment and policy must therefore support the movement of both goods and the information that accompanies them.

I believe the role of the freight forwarder is becoming more important as a result. In an increasingly fragmented and unpredictable trading environment, our role is evolving from organising transportation to coordinating increasingly complex supply chains. We connect modes, corridors, technologies and stakeholders while helping our customers navigate disruption and uncertainty. Our practical knowledge of how trade moves is essential to designing solutions that work across borders.

These findings also carry an important message for FIATA and its Association Members. As the global and national voices of the freight forwarding industry, we have a responsibility to identify the obstacles facing logistics and actively contribute to their solutions. FIATA must continue working closely with international organisations, while its Association Members should maintain strong and constructive engagement with their respective governments and public authorities. Our collective objective should be to advocate for the development and modernisation of transport infrastructure, while helping to shape rules and regulations that facilitate trade and logistics.

This responsibility is particularly important in digital transformation. Small and medium-sized enterprises must be able to participate fully as supply chains become increasingly digital. FIATA and its Association Members should support SMEs in their digital transformation journey by promoting accessible solutions, common standards, interoperability, capacity building and the wider adoption of electronic transport such as FIATA Electronic Bill of Lading. Digitalisation should be an opportunity to strengthen the competitiveness of SMEs, not become another barrier to their participation in global trade.

© 2026 FIATA International Federation of Freight Forwarders Associations

In an increasingly interconnected world, physical infrastructure, digital infrastructure and regulatory frameworks cannot be addressed in isolation or only at national level. International cooperation, harmonisation and the implementation of globally recognised standards are essential to creating efficient, resilient and sustainable supply chains.

The message I take from this survey is therefore one of both challenge and opportunity. The logistics industry has demonstrated extraordinary adaptability in recent years. Our next task is to turn that adaptability into long-term resilience through better infrastructure, smarter and more harmonised regulation, inclusive digital transformation, digital interoperability and stronger cooperation between governments, international organisations and the private sector. FIATA and its Association Members have an important role and responsibility in bringing the voice and practical experience of the freight forwarding industry into that process, while ensuring that SMEs can participate fully in the transformation of global logistics.

Comments from Antonella Teodoro, Senior Consultant, MDS Transmodal

The survey results show that regional logistics challenges are increasingly interconnected. Infrastructure constraints, regulatory complexity and geopolitical uncertainty may be experienced differently across markets, but disruption in one region can quickly affect capacity, costs and service reliability elsewhere. Digitalisation will be central to strengthening resilience, provided it is supported by interoperable systems, reliable data and regulatory frameworks that facilitate innovation and efficient cross-border trade. At the same time, investment in physical infrastructure and the modernisation of key trade corridors will remain essential as freight flows evolve. The findings therefore underline the need for coordinated action by industry and public authorities to build logistics networks that are more adaptable, connected and prepared for uncertainty.

These interconnections are also reflected in recent discussion within the maritime sector. A recent warning from the Consultative Shipping Group highlights concerns around the fragmentation of international maritime rules, linking geopolitical tensions, disruption to key routes and diverging regulatory approaches with greater uncertainty and costs for global trade. This perspective provides a useful illustration of the challenges identified by respondents and underlines that resilience depends on the consistent application of international rules and continued cooperation to keep trade corridors open, safe and reliable.

© 2026 FIATA International Federation of Freight Forwarders Associations



FIATA ASSESSMENT

The survey results broadly validate the priorities identified in the **FIATA Centennial Declaration on the Future of Logistics**. Across all regions, respondents point to a future logistics environment shaped by geopolitical uncertainty, digital transformation and the need for greater resilience. The findings suggest that digitalisation is no longer a standalone technology initiative, but a foundational enabler of visibility, interoperability, efficiency and competitiveness.

The results also reinforce the relevance of FIATA's work on multimodal transport corridors. While geopolitical tensions emerge as a major driver of change, corridors should be viewed as a practical response to this uncertainty rather than a driver in their own right. By providing alternative routes, strengthening multimodal connectivity and facilitating diversification of trade flows, corridors can enhance supply-chain resilience and continuity.

Similarly, the findings align with the conclusions of the **FIATA Corridor Handbook**, which identifies infrastructure, regulatory cooperation, digitalisation and coordinated corridor management as critical elements of successful corridor development. The persistence of challenges relating to infrastructure, border procedures and administrative complexity suggests that these priorities remain highly relevant across regions.

Taken together, the survey results support the direction established by the Centennial Declaration and confirm the continuing importance of digitalisation, resilience and connectivity as strategic priorities for the future of logistics.

STRATEGIC PRIORITIES FOR THE FUTURE OF LOGISTICS

Reflecting both the survey findings and the priorities contained in the FIATA Centennial Declaration, four strategic priorities emerge:

1. Accelerate Digital Transformation and Interoperability

The survey consistently identifies digitalisation, technology, automation and artificial intelligence as major drivers of future logistics performance. Digitalisation should therefore remain a strategic priority for industry and policymakers alike. Efforts should focus not only on technology adoption, but also on interoperability between systems, data exchange standards and regulatory frameworks that facilitate secure digital trade.

2. Strengthen Supply Chain Resilience Through Diversified and Connected Corridors

The prominence of geopolitical tensions across multiple regions demonstrates that supply chain resilience is becoming a strategic imperative. Governments and industry should continue investing in multimodal connectivity, cross-border cooperation and corridor development to ensure alternative routing options and greater supply chain flexibility. Transport corridors should not be viewed as drivers of change in themselves, but as practical instruments for addressing the growing uncertainty and fragmentation affecting global trade.

3. Modernise Regulatory and Administrative Frameworks

Across all regions, respondents identify regulations, bureaucracy, customs procedures and administrative complexity as significant constraints on logistics performance. Policymakers should therefore prioritise regulatory simplification, greater harmonisation of procedures and the digitalisation of administrative processes.

4. Invest in Integrated Physical and Digital Infrastructure

The survey demonstrates that infrastructure remains a major concern across regions, especially in Europe and the Americas. However, respondents also emphasise technology as a critical development priority. Future investments should therefore combine physical infrastructure development with digital infrastructure and data-sharing capabilities to maximise efficiency and resilience.

5. Support Skills Development and SME Participation

The digital transformation of logistics must remain inclusive. Policymakers, industry organisations and logistics providers should ensure that small and medium-sized enterprises have access to digital tools, common standards, training and capacity-building initiatives. The benefits of innovation will only be fully realised if businesses of all sizes can participate effectively in increasingly digital supply chains.



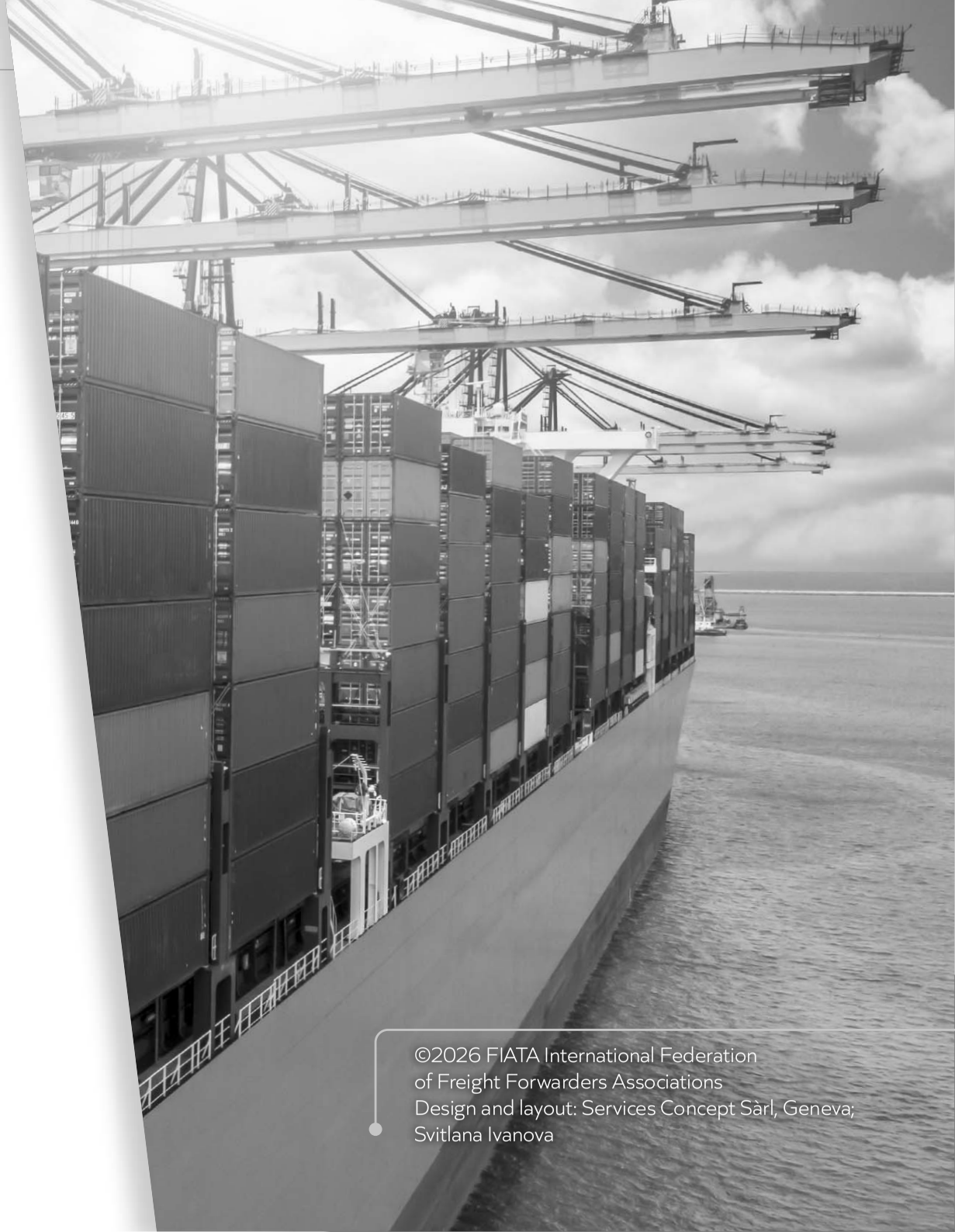
© 2026 FIATA International Federation of Freight Forwarders Associations

CONCLUSION

The 2026 Global Perceptions Survey demonstrates that logistics is entering a new phase characterised by increasing geopolitical uncertainty, rapid digital transformation and rising expectations for resilience. While the specific challenges differ across regions, respondents consistently highlight the importance of infrastructure, regulatory efficiency, digitalisation and connectivity.

The findings reinforce the vision set out in the FIATA Centennial Declaration on the Future of Logistics and suggest that the industry's long-term success will depend on its ability to combine resilient supply chains, interoperable digital systems and effective international cooperation. In this context, digitalisation is not merely a technological trend, and multimodal connectivity is not an end in itself. Together, they are essential tools for enabling a more efficient, resilient and inclusive global trading system capable of supporting the future growth of global trade.

© 2026 FIATA International Federation of Freight Forwarders Associations



©2026 FIATA International Federation
of Freight Forwarders Associations
Design and layout: Services Concept Sàrl, Geneva;
Svitlana Ivanova