OUTLOOK 2026

BREAKBULK EVENTS & MEDIA

Featuring commentary from:

AAL Shipping, Al Faris, BBC Chartering, Combi Lift Projects, deugro, DHL Global Forwarding, GEODIS, Jade Management Group, JGC Corporation, Methanex, Mitsubishi Power Americas, Port of Rotterdam, Project Logistics Engineering, Technip Energies, Trans Global Projects and UTC Overseas

Outlook Photo of the Year, Editor's Choice
Under the towering Sunnmøre Alps, *Wilson Caen* makes its way into Ørsta, where deep fjords meet breathtaking landscapes.
Credit: Wilson ASA

POWERING INTO 2026

By Simon West

Credit: AAL Shipping

As 2026 approaches, the breakbulk and project cargo market is evolving rapidly. Soaring demand from the energy and power sectors is tempered by structural challenges and shifting policy landscapes. In this section, industry leaders share their outlook on growth and the forces shaping the year ahead.

Ulrich Ulrichs, CEO, BBC Chartering

As we look ahead to 2026, the business outlook for breakbulk and project cargo remains cautiously optimistic, both globally and within our key markets. The sector continues to benefit from a relatively balanced supply-demand scenario, supported by reasonable freight and charter rate levels. Fleet renewal is underway, with new vessels joining our operations while older tonnage is gradually phased out.


Ulrich Ulrichs, BBC Chartering

Energy-related cargoes, particularly from the wind energy, oil and gas and mining sectors, remain the primary drivers of demand. These segments continue to generate robust volumes, reinforcing their role as the backbone of our industry's growth.

Globally, we anticipate markets to maintain a decent performance. That said, Europe faces structural challenges, including sluggish economic growth, high energy and labor costs, and the increasing impact of environmental regulations such as the EU ETS and FuelEU Maritime. These factors are beginning to weigh more heavily on operational margins and competitiveness.

The U.S. market presents a more complex picture. Trade volumes are under pressure due to shifting policy landscapes, with tariffs on commodity imports, restrictions targeting specific countries and sanctions on vessels built in China introducing a layer of unpredictability. Moreover, renewable energy projects in the U.S. are encountering delays and potential cancellations, further clouding the outlook.

Geopolitical tensions and ongoing conflicts continue to cause uncertainty in global trade flows. These factors will surely continue to be visible in 2026, requiring agility, foresight and resilience from industry stakeholders.

Kyriacos Panayides, CEO, AAL Shipping

The global wind energy industry is projected to expand by an average of 8.8% annually, adding a total of 982 gigawatts (GW) of new capacity (both onshore and offshore) over the next five years. For onshore wind, the Global Wind Energy Council (GWEC) projects annual installations of around 138 GW, with China set to account for

BBC Houston passes through St. Lambert Lock, Canada, with a full shipload of windmill blades.
Credit: BBC Chartering


Kyriacos Panayides, AAL Shipping

close to half, and Europe at a distant second with 15%. Meanwhile, the compound annual growth rate (CAGR) of offshore wind is estimated to be at 27%, again led by China and Europe.

In Europe alone, more than 51 GW of offshore wind capacity is scheduled to be built between 2025 and 2030, with the UK contributing approximately 42%. Looking ahead, we expect demand for power to increase by about 80% in the next 25 years, with the Asia-Pacific region accounting for 60% of that growth. At the same time, natural gas power capacity is projected to increase by 38 GW per year from 2025 to 2050.

In the medium term, we expect shipping demand linked to power generation to grow as countries reduce emissions from coal and other traditional sources. At the same time, the rapid expansion of AI-linked infrastructure is accelerating global electricity consumption. These dual trends reinforce the need for cleaner, more efficient energy generation and, by extension, smarter, more specialized shipping solutions.

Danny Levenswaard, director of Breakbulk, Port of Rotterdam Authority

The Port of Rotterdam expects a resilient and forward-looking breakbulk and project cargo market in 2026. Several key factors contribute to this outlook, with energy transition the real growth driver. Rotterdam is seeing increasing volumes of components related to offshore wind, hydrogen infrastructure and carbon capture projects. These developments are fueling demand for complex and heavy cargo logistics.

We're seeing this stable growth despite market volatility. In the first half year of 2025 other general cargo increased by 3% to 3.2 million tons. This increase was due in part to the delivery of offshore wind foundations, steel conduits for the Porthos carbon capture and storage (CCS) project and increased transshipment of steel plates for the offshore industry.

Still, challenges remain, especially those that relate to workforce and skills. The ability to attract and retain skilled labor remains key, especially as cargo types become more complex and specialized.


Danny Levenswaard, Port of Rotterdam Authority

NAVIGATING UNCERTAINTY

Project logistics faces a world in flux, from geopolitical strains and shifting trade dynamics to infrastructure limitations and stricter regulation. We asked industry leaders what challenges will shape the industry in 2026 and how companies can stay ahead to keep projects and cargo on track.

Geanean Ordonez, Technip Energies

Geanean Ordonez, project logistics manager, Technip Energies

On a geopolitical level, we will see the same challenges in 2026 that we are currently facing. Globally, Israel seems to have struck a peace treaty with Gaza, and we remain cautiously hopeful this remains in place. Otherwise, we could see another blockade at the Suez Canal. The war between Russia and Ukraine continues, resulting in sanctions hindering sourcing of supplies and exports from that region. The U.S. continues to revise tariffs, USTR vessel fees are imminent, and import documentation is more complex than ever. And China continues to pivot and remain competitive.

The project outlook in 2026 is modest now, but the pipeline of upcoming projects will keep everyone busy for the foreseeable future between 2027 and 2030. As a result, we anticipate suppliers' orderbooks will be full during this period. Procurement teams should be working with suppliers now to get on their orderbooks ahead of this coming busy season. Compliance teams should be actively working with their procurement teams and suppliers to ensure documentation is adequate to meet the CBP requirements for entry into the U.S. They should be monitoring the derivatives list and providing a framework for suppliers to properly report steel and aluminum content.

We do expect the dust to begin to settle on the topic of tariffs in the U.S. in 2026. At which time we will finally have some clarity and can provide some assurance and solid guidance for our clients. Take this opportunity to review lessons learned and prepare your teams for the coming wave!

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> GEANEAN ORDONEZ, TECHNIP ENERGIES

Mohammad Jaber, Combi Lift Projects

Mohammad Jaber, CEO, Combi Lift Projects MEA

The breakbulk and project cargo industry is heading into 2026 with no shortage of challenges and opportunities. The sector is being tested by a perfect storm of geopolitical tensions, economic headwinds and logistical constraints. Globally, we're seeing continuing supply chain volatility, limited vessel capacity and rising project costs driven by inflation, the energy transition and tighter environmental regulations. Decarbonization and environmental, social and governance (ESG) commitments are reshaping fleet deployment, while financing for capital-intensive projects or logistics modern assets is getting harder to secure.

Credit: Technip Energies

Infrastructure congestion and a global shortage of specialized equipment and skilled crews are further stretching timelines and costs. Yet, the Middle East, especially the Gulf, remains a growth engine. Massive investment in renewables, downstream industries and mega-projects is keeping the region vibrant. But disruptions in the Red Sea, sanctions, higher fuel prices and interest cost and shifting China–Gulf–Europe trade routes are forcing everyone to rethink logistics strategies.

To stay ahead, Combi Lift is investing heavily in robotics, AI and automation. Digitalization is not a luxury anymore. It's how we offset inflation, boost efficiency and stay competitive. Real-time visibility, predictive maintenance and smarter capacity use will define the winners. Ultimately, success in 2026 will belong to companies that combine agility, technology and deep regional understanding — a balance Combi Lift is determined to lead!

Grant Wattman, president, Jade Management Group

Recently I was asked for one word that I would use to describe 2026. My answer was "dynamic." Not one big challenge, but many, many challenges. Whether they be workforce management, net-zero emissions, supply chain disruptions, regulatory and trade complexity, technology and digital transformation or just simply rising costs in an inflationary period. Wrap these issues with geopolitical shifts and unrest, global trade wars and changing markets, and you have a mosaic of interconnected challenges in the industrial, capital project markets.

> "IF I COULD PULL ONE WORD FROM THESE CHALLENGES, IT WOULD BE "INDECISION." GUILTY PARTIES PRIMARILY BEING GOVERNMENTS AND REGULATORS."
> GRANT WATTMAN, JADE MANAGEMENT


Grant Wattman, Jade Management

If I could pull one word from these challenges, it would be "indecision." Guilty parties primarily being governments and regulators. Not always indecisive due to too many choices, but indecisive to disrupt the market and drive policy globally. Our industry is resilient and nimble. It can adapt quickly in realigning its global supplier base and trade routes, regardless of the decisions being made. Just make a decision!

The long-term market is looking to increased project cargoes of all types. Unpredictability pushes major capital investments forward. Delaying decisions for one year does little, if anything, to minimize the disruptions. Overall, this could dampen global growth, resulting in cargo demand retrenching and vessel capacity increasing.

As a mentor of mine coached me: be agile, iterate, iterate, iterate and be comfortable with being uncomfortable. What an exciting time to be in our business!

SHIFTING OPPORTUNITIES

As emerging energy markets expand and the world's appetite for power intensifies, opportunities for project logistics continue to soar. Here, industry experts from across the supply chain identify the sectors poised to drive breakbulk and project cargo volumes in the year ahead.


Felix Schoeller, AAL Shipping

Felix Schoeller, chief commercial officer, AAL Shipping

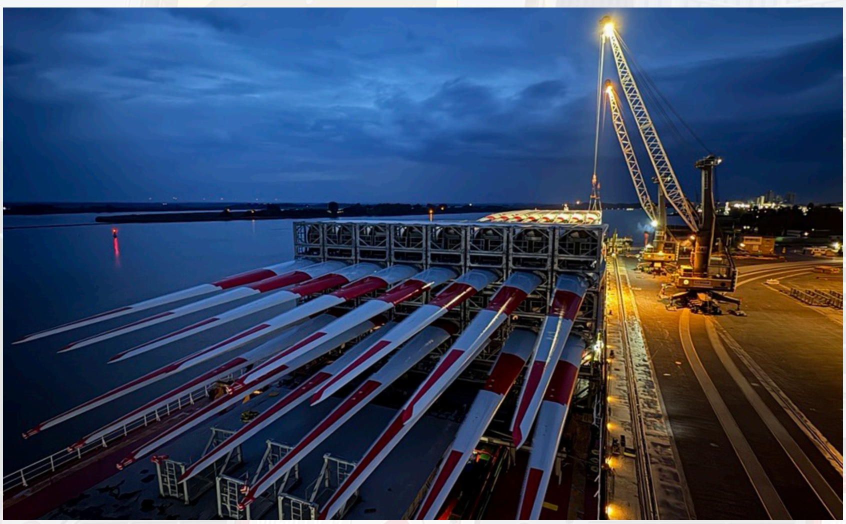
The global breakbulk and project cargo market in 2026 will be defined less by a single macro trend and more by regional opportunity shaped by the energy transition, infrastructure reinvestment and nearshoring.

Renewable energy projects remain strong in Oceania, intra-Asia and Europe, supporting ongoing shipments of turbines, transformers and other heavy components. The U.S. will remain challenging for 2026 and years to come. Sustained investment in oil, gas and construction will underpin demand in the Persian Gulf. North America is also showing promise, with growth in oil, gas and power.

We see significant opportunity emerging in developing markets, where major infrastructure and industrial strategies are translating into greater breakbulk and project cargo shipments. The Middle East and the Persian Gulf remain key pivotal growth corridors for us, despite geopolitical tensions. Renewed infrastructure and energy project construction continues to generate heavy-lift and breakbulk demand across ports and charter markets.

Indonesia's transition from a resource-export model to value-added onshore manufacturing is producing a steady pipeline of projects that require inbound components, heavy equipment and specialized logistics, while India's drive for infrastructure and energy investment is increasing demand for transformers, modules and industrial equipment. At the same time, we are seeing stronger domestic manufacturing capability in the renewable and non-renewable energy sectors. Together with higher foreign industrial investments, these trends are contributing to an increase in demand for project cargo imports.

Across Southeast Asia, we continue to see the manufacturing and fabrication of project cargo components expand as stakeholders diversify away from dependence on China amid ongoing geopolitical risk. Over recent years this trend has gathered steady momentum, and with the Trump administration's renewed trade tariffs and protectionist stance, we are now seeing an even greater push to source from this region, further diluting China's dominance.


Credit: deugro

Koichi Kaizu, logistics subject matter expert for module transportation, JGC

Based on our company's business lookahead viewpoint, we observe LNG continuing to play a central role in Asia's energy transition, as next-generation fuels such as hydrogen and ammonia remain in early stages of commercialization. Their full supply chains, from production to end-


Credit: Al Faris


Koichi Kaizu, JGC

use, are still under development. In contrast, LNG infrastructure projects are active and expanding, especially in Southeast Asia and South Asia, driving consistent demand for project logistics.

Asian countries will remain key sourcing hubs for materials and equipment, including fabricated modules, contributing to a stable base volume in breakbulk, heavy-lift and module transport segments. Project cargo demand in Asia will remain strong and diversified through 2026 and beyond.

Kieve Pinto, chief operating officer, Al Faris

As we move into 2026, the heavy transport and project logistics industry across the Middle East is positioned for sustained and strategic growth. The region's infrastructure and industrial pipeline remain robust, driven by ambitious national visions and economic diversification efforts. Across the GCC, large-scale investments in renewable energy, green hydrogen, petrochemicals and advanced manufacturing are reshaping the landscape of heavy transport and project logistics.

Where once cargo flows were primarily import-driven, we now see increasing intra-regional and export movement as local fabrication and manufacturing capabilities mature. This shift demands advanced technical expertise, precision planning and integrated heavy-lift solutions that combine engineering, transport and installation under one umbrella.

At Al Faris, we continue to align with this transformation by expanding our fleet, enhancing our digital capabilities and investing in people and technology. Our focus remains on safety, reliability and innovation, enabling us to support our clients in delivering complex, high-value projects that power the region's next chapter of growth and energy transition.

Kasper Heiselberg, head of global wind renewable energy, deugro

Europe will remain a key driver for wind logistics, but we're seeing new frontiers emerging in Korea, Japan, Taiwan and Australia. The next big opportunity lies in smarter, more collaborative supply chains, combining engineering, transport and data to enable faster renewable growth worldwide.

Beyond 2026, Northern Europe and Europe in general will continue leading demand for wind logistics, with Asia-Pacific rapidly gaining ground. The biggest opportunity ahead is to industrialize and standardize offshore wind logistics, linking global manufacturing with regional installation in a sustainable way.


Kieve Pinto, Al Faris


Kasper Heiselberg, deugro

CARGO WITH A CONSCIENCE

Will new fuels, tighter regulations and digital tools finally push the sector toward real change? GEODIS's Luke Mace shares how meaningful emissions reductions can be achieved most immediately, while Methanex's Roger Strevens reacts to the IMO's decision to postpone the adoption of its net-zero framework.

Luke Mace, senior vice president, freight forwarding / project logistics, GEODIS

One of the main challenges lies in finding a balance between growth ambitions and reducing greenhouse gas (GHG) emissions. There is a clear imbalance between transit times and cost efficiency versus customer expectations.

If we look at short-term and impactful actions, it's about using the most efficient solutions available today, such as prioritizing sea or rail transport over air whenever possible, selecting the most energy-efficient aircraft or vessels (for example through GEODIS AirSmart), increasing the use of available low-carbon fuels such as sustainable aviation fuel (SAF), sustainable marine fuel (SMF) or hydrotreated vegetable oil (HVO), which can reduce GHG emissions by up to 80%, and ensuring space utilization so we don't ship empty space.

Luke Mace, GEODIS

GEODIS AirSmart is a great illustration. The company has recently launched this new low-carbon airfreight solution, designed to significantly reduce GHG emissions by optimizing aircraft performance and routing. By selecting the most energy-efficient aircraft and leveraging external flight data and advanced analytics, GEODIS AirSmart enables smarter routing decisions and enhances performance.

This innovation represents a major step forward in GEODIS's journey toward decarbonization and supports customers in achieving their climate goals. With GEODIS AirSmart we can achieve up to 40% reduction in GHG emission per shipment.

Roger Strevens, director, low carbon regulation and advocacy, Methanex

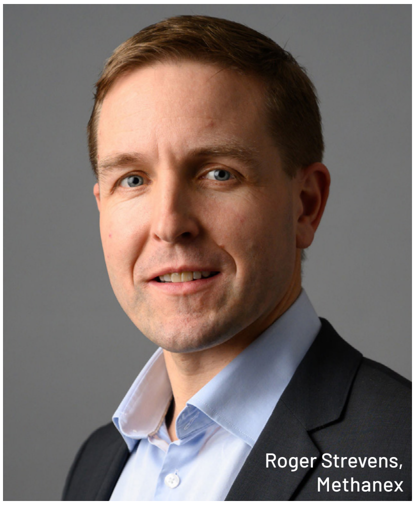
In mid-October, the International Maritime Organization (IMO) held a meeting to consider the adoption of the Net Zero Framework (NZF), the regulatory package that is intended to deliver on the goals of its 2023 GHG strategy, which was unanimously supported by member states. The NZF had been approved, the first step in the regulatory process, by a large majority back in April at Marine Environment Protection Committee (MEPC) 83. However, due to widely reported pressure from the U.S., many member states changed their positions. The outcome was that a vote was called to adjourn the adoption meeting by a year, and it was carried 57-49.

While adjournment of the adoption meeting was disappointing to many, it is important to note the NZF has not been rejected, rather member states are not in a position to adopt it yet. Critically, there is now time to develop the NZF to a point where there is consensus for adoption.

It is important for the IMO not to lose momentum. Work continues on the supporting guidelines, and the IMO Secretariat will consult closely with member states to determine the best path forward. The consistent support from global shipping organizations highlights the industry's readiness to advance sustainability and clean fuels. A unified global approach for a global industry is

> "ONE OF THE MAIN CHALLENGES LIES IN FINDING A BALANCE BETWEEN GROWTH AMBITIONS AND REDUCING GREENHOUSE GAS (GHG) EMISSIONS."
> LUKE MACE, GEODIS

"CONSISTENT SUPPORT FROM GLOBAL SHIPPING ORGANIZATIONS HIGHLIGHTS THE INDUSTRY'S READINESS TO ADVANCE SUSTAINABILITY AND CLEAN FUELS." ROGER STREVENS, METHANEX


Roger Strevens, Methanex

economically and environmentally preferable to fragmented regulations that are separated by national and regional borders.

For breakbulk shipping companies, the NZF deferral may temporarily pause decisions around retrofitting or ordering vessels for alternative fuels, but it also offers a window to monitor developments like the upcoming review of FuelEU Maritime. Given the long-term nature of fleet investments, it remains prudent to anticipate the growing prominence of decarbonization regulations.

In this context, methanol stands out as a compelling option for breakbulk vessels due to its favorable overall cost, lower complexity and minimal impact on cargo space. It is compatible with tramp operations due to the relatively low cost of port infrastructure needed, making it an attractive choice. Methanex is committed to supporting shipping companies as they navigate these decisions.

In summary, given that the shipping industry wants to progress and leading clean fuel producers are poised to deliver, the pace of political alignment will be crucial for future progress.

Credit: GEODIS


Credit: Methanex

TECH TALK

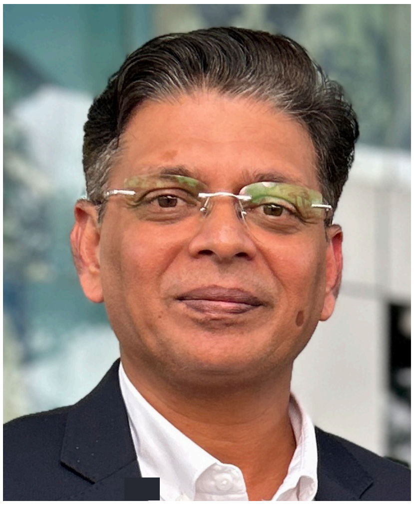
Project professionals pinpoint the biggest opportunities for innovation and digital transformation in 2026 and beyond, and the barriers that still limit wider digital adoption in the breakbulk and project sector.

Dharmendra Gangrade, thought leader on global shipping and logistics and a member of the Breakbulk Advisory Board

The biggest opportunities for innovation or digital transformation in 2026 and beyond lie in the realm of Logistics-as-a-Service (LaaS) for global shipping, which is fundamental to nearly 90% of global trade.

The post-COVID digitalization journey has equipped stakeholders with robust systems capable of application programming interfaces (API) integration, paving the way for the development of industry-wide digital platforms. These platforms can be customized for specific needs and integrate seamlessly with ERPs or other systems via a robust middleware. This creates a connected ecosystem, surpassing blockchain capabilities by facilitating not only the exchange of commercial documents but also the real-time transmission of events, enhancing visibility and control over shipping transactions.

Furthermore, the application of AI in supply chain and logistics has evolved from being a buzzword to a reality, transitioning from basic automation



Dharmendra Gangrade, member of the Breakbulk Advisory Board

and demand forecasting to autonomous decision-making. Currently, AI is utilized for predictions and route optimization based on historical data. However, in the near future, AI-driven systems are expected to independently orchestrate logistics, making real-time decisions on freight and schedule optimization to meet demand.

Despite these opportunities, barriers to wider digital adoption persist in the breakbulk and project sector. These include resistance to change and concerns about integration failures and data security. Large organizations often hesitate to invest in new technologies due to internal constraints and trust issues with LaaS providers. Addressing concerns about data security, confidentiality and the financial stability of LaaS players is crucial for this transformation.

By 2026 and beyond, businesses that embrace API-driven, AI-enabled LaaS platforms are likely to achieve greater cost-efficiency, enhanced service levels and scalability in their operations, which are exposed to continuous disruptions due to global geopolitical events leading to uncertainty and volatility.

"BUSINESSES THAT EMBRACE API-DRIVEN, AI-ENABLED LAAS PLATFORMS ARE LIKELY TO ACHIEVE GREATER COST-EFFICIENCY, ENHANCED SERVICE LEVELS AND SCALABILITY IN THEIR OPERATIONS." DHARMENDRA GANGRADE

Kevin Kwateng, founder and CEO, Project Logistics

Digital transformation means swapping paper and guesswork for smart tech. With real-time tracking and automation, teams can see exactly where shipments are, catch mistakes and plan better routes. New digital tools speed up jobs, reduce risks and help everyone work faster and smarter, even for those who aren't tech experts. The payoff is fewer errors, better coordination, safer operations and more career opportunities across the industry.

Our team is made up of heavy-lift and transport engineers, so we design solutions grounded in daily industry needs. Take our route and cargo planning tools: Transport teams can simulate heavy moves, check for clearance, calculate axle loads and confirm secure lashing, all before hitting the road. These tools help get fast approvals, prevent overload fines and avoid accidents caused by


Kevin Kwateng,
Project Logistics


Credit: Project Logistics

shifting cargo. The result is less risk, more accuracy and quicker, safer jobs. Adoption across the industry faces hurdles: old tech is hard to replace, many still use paper forms and some hesitate to change. But for those who do, jobs get easier, compliance is smoother and teams can handle more with less stress.

Marco Poisler, chief operating officer, global energy and capital projects, UTC Overseas

The next wave of digital transformation will be defined by interoperability and resilience. As crane systems, vessels and terminals become increasingly digital, the challenge is not more data but smarter integration, linking predictive insights directly to operational execution while maintaining human oversight.


Marco Poisler,
UTC Overseas

Credit: UTC Overseas

AI will enable continuous situational awareness across the logistics chain, supporting faster, more coordinated decision-making. The opportunity lies in turning digital intelligence into operational reliability. From a practical point of view, this means every connected system contributes to safer lifts, reduced vessel idling and measurable emissions gains, without losing the adaptability that experienced professionals bring to complex cargo moves.

At UTC Overseas, we are advancing proprietary AI tools that apply retrieval-augmented reasoning to reduce labor-intensive documentation and compliance tasks across the project cargo lifecycle. These systems automate data validation, regulatory cross-checking, and knowledge retrieval from thousands of shipment records, freeing teams to focus on operational judgment and client service. The result is faster response time to customs and port authorities, fewer clerical errors, and a more consistent compliance process across regions.

AI is not replacing logistics professionals but rather enabling them to operate with greater precision and efficiency in an environment defined by complexity and constant change.

WHY YOUR REGION ROCKS!

We asked four industry leaders from the Middle East and Africa, Asia, the Americas and Europe why the world should be watching their region in 2026 when it comes to breakbulk and project cargo.

Amadou Diallo*, CEO, DHL Global Forwarding Middle East & Africa

The Middle East and Africa region continues to grow in importance for global logistics, particularly in breakbulk and project cargo. Its geographic location supports efficient trade flows between Asia, Europe and Africa, and the region is seeing consistent investment in infrastructure, energy and industrial development.

At DHL, we are investing more than €500 million into the Middle East and €300 million into Sub-Saharan Africa, reflecting our long-term confidence in the region's potential. These investments are focused on expanding multimodal logistics capabilities, warehousing and digital platforms that help customers manage complex cargo movements and respond to shifting global conditions.

The latest DHL Global Connectedness Tracker shows that, despite global trade volatility, the Middle East, for instance, remains one of the few regions with an upgraded trade growth outlook. This resilience is supported by strong infrastructure, rising intra-regional trade and the region's role in supply chain diversification. In the Gulf, trade volumes are rising, supported by economic diversification and connectivity. And in Africa, we are seeing growing demand for industrial, healthcare and energy-related logistics.


Amadou Diallo, DHL Global Forwarding*

Breakbulk and project cargo are central to many of these developments, from moving equipment and renewable energy components to supporting large-scale infrastructure projects. Both region's logistics capabilities are evolving quickly, and its importance in global supply chains is only set to grow.

**Since the time of writing, Amadou Diallo has announced he will move to a new role as group CEO at Aramex, effective May 1, 2026.*

Lim Ling Ling, managing director Malaysia, Trans Global Projects


Lim Ling Ling, TGP

Asia is where momentum meets opportunity. From Malaysia, we're seeing a surge in demand for complex project logistics, especially in the energy, infrastructure and industrial sectors. With our new office in Kuala Lumpur, Trans Global Projects is positioned at the heart of this growth, offering clients deep regional expertise, agile execution and global standards.

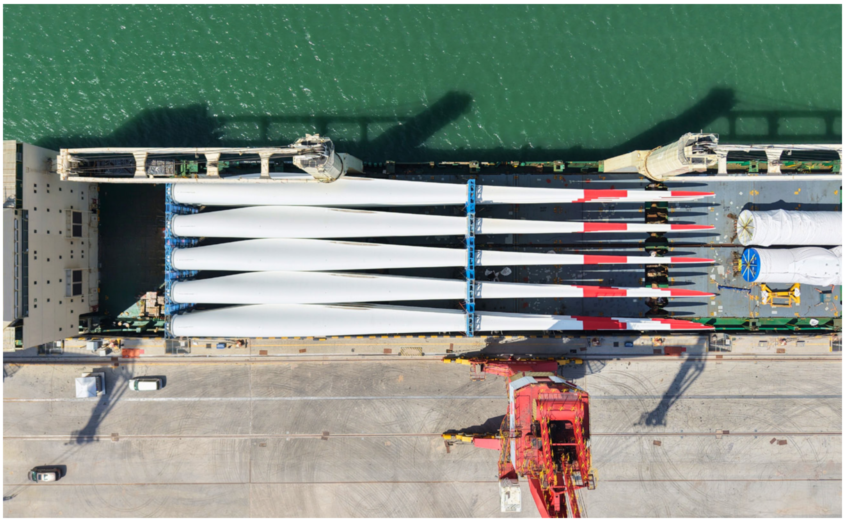
A diverse, well-educated, multi-lingual and trainable workforce serves as the foundation of Malaysia's economic growth. Kuala Lumpur is home to many foreign oil and gas (O&G) multinationals and a thriving domestic base of O&G companies. With a steady supply of skilled professionals, Malaysia has become a compelling investment destination and is creating long-term growth opportunities within Asia's O&G industry.

We're proud to be part of this dynamic transformation and excited about the opportunities ahead. The region's pace, scale and diversity make it a critical engine for innovation and delivery in global project logistics.

> **"THE MIDDLE EAST AND AFRICA REGION CONTINUES TO GROW IN IMPORTANCE FOR GLOBAL LOGISTICS, PARTICULARLY IN BREAKBULK AND PROJECT CARGO."**
> **AMADOU DIALLO, DHL GLOBAL FORWARDING***

Agustin Harriague,
Mitsubishi Power Americas

“IF YOU’RE LOOKING TO EXPERIENCE THE ENERGY TRANSITION AT FULL STEAM, LOOK NO FURTHER THAN THE AMERICAS. THE MARKET IS RED HOT.”
AGUSTIN HARRIAGUE, MITSUBISHI POWER AMERICAS



Credit: TGP

Agustin Harriague, VP, logistics and supply chain operational excellence, Mitsubishi Power Americas

If you’re looking to experience the energy transition at full steam, look no further than the Americas. The market is red hot, and there’s nothing to compare it to, not even the last gas turbine boom. Power demand is being driven not by a single cause, but by several at once: AI, data centers, electrification, manufacturing growth and reshoring. Together, they have created a “never before seen” energy landscape that is redefining project logistics across the region.

During 2025, the pace of project development has only accelerated. Clients are moving fast, driven by the need for reliable, 24/7 baseload generation with a clear path to decarbonization. The collaboration among OEMs, EPCs, utilities and developers is stronger than ever, built on trust and shared urgency. Everyone is rising to meet the challenge, expanding manufacturing capacity and infrastructure while managing tight supply chains and labor constraints.

Natural gas-fired generation is leading the charge to meet immediate demand, while investments in CCS, hydrogen and nuclear keep the long-term transition alive. Customers want power now and clean power tomorrow. The Americas are proving that reliability and decarbonization can advance together, and that is what makes this region impossible to ignore.

Danny Levenswaard, director of Breakbulk, Port of Rotterdam Authority

Europe is the center when it comes to the production of high-valued materials, such as high-grade steel and non-ferrous. Next to that, it’s a frontrunner when it comes to project cargo. Amid the energy transition, the region has set itself high targets. This ensures developments in project plants, offshore wind farms, upgrading existing facilities, and more. Europe is also at the forefront of the raw material transition. Here, resources such as steel, non-ferrous metals and forest products are being re-used to produce new materials.

However, Europe is also facing difficulties due to labor shortages, rising energy costs and the relocation of companies to other areas, particularly within the chemical industry. The region is determined to tackle these challenges, with world-class companies that have made these issues a top priority. In addition, Europe has the right infrastructure to address the challenges and is well-positioned to assist other regions to overcome their own.

All in all, the region does face obstacles, but it also houses the right companies to embrace these and turn them into opportunities. Europe, therefore, really is a region to keep a close eye on!

Danny Levenswaard,
Port of Rotterdam Authority