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OCEAN NETWORK EXPRESS

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SHIPPING
PARTNER



Delivering the Extraordinary

ONE helps you move complex and special cargo safely, reliably, and at scale.

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Executive Summary: Delivering the Extraordinary

Special cargo is now a core pillar of global development. Out-of-gauge (OOG) and breakbulk shipments support many of the world's largest energy, infrastructure and industrial projects.

In 2024, the global project cargo market was valued at around US\$29 billion and is forecast to reach more than US\$38 billion by 2033, reflecting steady growth as megaprojects accelerate across Asia, Europe, North America and the Middle East, reshaping skylines, power grids and industrial hubs.

Global Project Cargo Market's Value



Source: Global Growth Insights

This momentum is driven by the clean-energy transition, rapid urbanization and the rise of new manufacturing hubs. Each trend increases the number of large, complex components that must move safely across borders. For executives, special cargo is project-critical. Delays can disrupt construction schedules and stall multimillion-dollar investments. OOG cargo acceptance and schedule reliability are non-negotiable. Without both, even the most well-funded developments can lose momentum from day one.

Rising Complexity and Higher Stakes

This growth introduces new operational pressures on the supply chain.

Investment in clean energy, defence and large construction programs is driving more OOG and breakbulk cargo into networks that aren't always ready to handle these shipments. Regulations for oversized loads are tightening. The transition to zero-emission construction machinery makes cargo heavier and more hazardous—exposing limitations in conventional OOG transportation models. Geopolitical tensions can trigger sudden shifts in routes, costs and transit times. Inland connections face their own constraints, with congestion and limited capacity across road, rail and barge. Together, these challenges make cost, timing and

reliability harder to control. To stay resilient and continue delivering beyond expectations, shippers need clarity, strong planning and partners who can navigate uncertainty with precision. As global projects scale, this need will only increase.

Why Reliability and Acceptance Expertise Matter

Success in special cargo begins long before a vessel call. Dimensions, center of gravity, weight distribution and equipment determine whether cargo can be accepted, lifted and stowed. As shipments grow larger and handling rules become stricter, technical accuracy is as important as frequency or transit time. Leaders are looking for partners who can confirm feasibility early, align with terminals in advance and surface risks before they affect the project.

ONE's Special Cargo teams work upstream—reviewing drawings, validating equipment fit, confirming payload and securing requirements, and coordinating lifting plans early in the process. This approach reduces uncertainty and strengthens execution, even for oversized, high-value cargo central to national infrastructure and industrial growth.

Delivering Certainty in Special Cargo

Large, high-value project cargo depends on clear information and aligned partners at every step. ONE works with customers to synchronize these touchpoints, ensuring that cargo is not just accepted, but fully prepared for execution. Clear communication and disciplined coordination transform complexity into controlled delivery.

For executives, the path forward is clear. Build resilient logistics networks, choose partners who can manage complexity and treat special cargo as a strategic capability. Organizations that do this will be better placed to deliver projects on time and turn ambitious, larger than life plans into reliable outcomes. In short, they will be ready to deliver beyond what their markets expect.

Global Special Cargo Trends: Bigger and Bigger Moves



Takeshi Uechi
Vice President,
Strategic Yield Management,
Ocean Network Express

“

The scale of today's infrastructure and energy investments is reshaping global trade patterns. As projects grow larger and timelines grow tighter, our focus is on helping customers navigate these shifts with confidence. The more complex the cargo becomes, the more important it is to provide stable, predictable solutions across every region we serve.”

The global special cargo landscape is being reshaped by three structural forces: the clean-energy transition, the rapid rise of new manufacturing hubs, and unprecedented levels of infrastructure investment. Together, these dynamics are increasing both the volume and complexity of OOG and breakbulk cargo moving across major trade lanes.

Worldwide infrastructure investment needs are projected at about

US \$4.2 trillion

a year over the next decade, as countries work to future-proof their transport, energy, social and digital networks.

Source: Allianz

At the same time, trade flows are shifting. Supply chains are dispersing across Southeast Asia, South Asia and the Middle East, creating new corridors for heavy industrial and energy-related cargo. For executives, these shifts underscore a clear requirement: partners who can help navigate new trade patterns, deliver predictable capacity and manage the growing technical demands of moving larger cargo safely and on time.

Growth Drivers in Special Cargo

Major construction, industrial expansion and the energy transition are driving global demand for special cargo.

The construction market is expected to grow from about

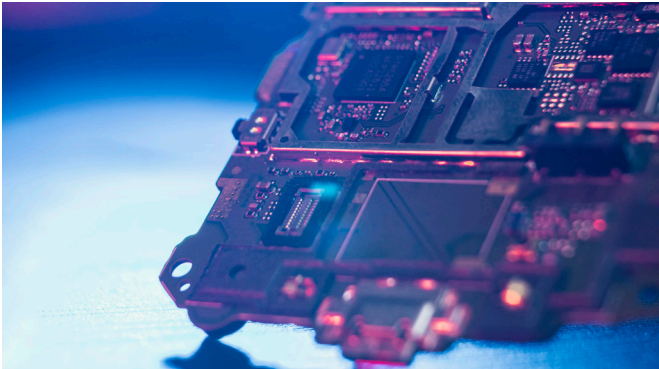
US \$ 11.4 trillion in 2024 → **US \$ 16 trillion** by 2030

as countries build transport infrastructure, utilities, industrial plants and large public assets.

Source: Deloitte

In automotive manufacturing, Thailand is emerging as a regional Electric Vehicle (EV) production hub, often described as the “Detroit of Asia” as Chinese and Japanese automakers establish new factories under a China-Plus-One strategy. This shift is supporting a projected 5.3% CAGR in machine-tool imports through 2030, reinforcing demand for the movement of large, high-value industrial equipment.

Semiconductor supply chains are also fragmenting globally. In the United States, the CHIPS Act is driving record-high demand for manufacturing equipment to equip new fabrication plants, while China continues massive domestic investments to bolster self-sufficiency, generating sustained demand for time-critical and high-specification cargo movements.



Meanwhile, global energy investment is set to reach roughly US\$3.3 trillion in 2025, with around US\$2.2 trillion directed to clean-energy technologies such as renewables, grids, storage and electrification. These projects depend on the safe movement of turbines, transformers, nacelles, generators and heavy machinery. As components increase in size and handling complexity, demand for reliable special cargo planning and capacity rises accordingly, elevating logistics decisions to board-level importance.

Shifting Manufacturing Hubs and Trade Lanes

Today’s manufacturing is diversifying beyond traditional centers. Production is expanding across Southeast Asia, the Middle East and other fast-growing markets, reshaping global flows of machinery and industrial equipment.

Vietnam’s industrial output has risen **>8%** year-on-year.

Malaysia secured **US \$22.28 billion** in manufacturing investment in the first nine months of 2025.

Source: VnEconomy and Invest Malaysia

Driven specifically by nickel mining for EV batteries, Indonesia is scaling electronics, automotive and machinery production, while Gulf states expand logistics and industrial clusters in support of national development plans.

In parallel, initiatives such as China’s Belt and Road, India’s national infrastructure programs and Saudi Arabia’s Vision 2030 mega-projects (including NEOM and the Red Sea development), alongside expanding investment across parts of Africa, are opening new corridors for heavy and oversized cargo. As these hubs grow, shippers are looking for carriers who can connect emerging origins and destinations with consistent special cargo expertise and network coverage, so that new factories, plants and industrial zones can go from blueprint to live production without delay.



The Move to Containerized Breakbulk

More project cargo is moving within container networks as shippers look for predictable schedules, broader port coverage and reduced dependence on dedicated heavy-lift tonnage. Flat racks, open tops and breakbulk-on-flat-rack solutions now allow many oversized items to ship on regular liner services instead of waiting for multipurpose vessels (MPV).

Capacity in the MPV segment is tight. The global multipurpose fleet is ageing, and the order book for new MPV tonnage remains small relative to existing capacity, limiting future supply growth for traditional breakbulk services. This encourages project owners, EPCs (Engineering, Procurement and Construction) and forwarders to design equipment, where possible, within container-based special cargo envelopes.

Containerization gives shippers access to a wider port network, more frequent sailings and better alignment with standard logistics planning cycles, all of which support tighter project schedules and help deliver complex, multi-phase projects in a smoother, more predictable way.

Focus on Safety, Compliance and ESG

Safety and environmental performance are now central to project cargo decisions. As shipments grow in size and value, regulators, insurers and project owners expect higher standards for lifting practices, securing methods and route planning, along with better documentation and traceability.

Environmental expectations are also rising. The UN's Review of Maritime Transport 2024 notes that stricter emissions requirements and decarbonization targets are pushing carriers to improve efficiency, adopt cleaner technologies and provide more transparent reporting on environmental performance.

For major projects, ESG criteria are increasingly built into tenders and financing. Investors and lenders want clear visibility of safety records, environmental impact and labor practices before supporting large infrastructure or energy developments. As a result, shippers are choosing partners who can demonstrate safe operations, strong compliance and a measured approach to emissions and reporting, so that every move supports both project outcomes and long term sustainability goals while still delivering beyond cost and timing.

Why Special Cargo Raises the Stakes?

Special cargo moves expose shippers to a specific set of risks. Oversized components rely on precise coordination, varying port capabilities, complex regulatory rules and supply chains that are more exposed to global shocks. Managing these risks is now central to delivering major projects on time and within budget, while protecting the wider economic impact those projects are designed to create.





Operational Pressures: Handling, Port Limits and Infrastructure Gaps

Oversized cargo is difficult to move through ports and inland networks. Many terminals work within strict limits for crane capacity, lifting gear, height clearances and over-length acceptance. Storage space is often constrained, particularly as OOG and breakbulk volumes grow with the expansion of energy and infrastructure projects.

Inland legs add further pressure. Road, rail and barge networks can face congestion, driver shortages or restricted heavy-haul capability. These constraints increase the risk of rollovers, missed connections or cargo being turned away at arrival. Without early feasibility checks and strong alignment across handling points, even a well-planned shipment can face delay and put project milestones at risk.

Regulatory & Compliance Hurdles

Regulation has become one of the most complex aspects of special cargo. Oversized loads require permits, escorts, route surveys and approvals that differ from country to country, and often between states or municipalities. Clean energy and defence cargo can face additional layers of customs, security and inspection. Rules also change frequently.

One missing document, an expired permit or a non-compliant securing method can stall a shipment before it reaches the gate. Managing this environment requires up-to-date knowledge and close coordination with local authorities and on-the-ground partners who understand the stakes when cargo underpins critical infrastructure or national programs.

Geopolitical Volatility, Climate Disruptions and Supply Chain Instability

Global conditions are less predictable. Trade tensions, tariffs and sanctions can disrupt established corridors and raise costs with little warning. Political instability in key regions adds risk to long-haul moves. Climate-driven events such as storms, floods and extreme heat can also impact port operations, sailing schedules and inland moves.

At the same time, port congestion and volatile freight markets make long-term planning harder, especially for time-sensitive project cargo. These disruptions increase lead-time uncertainty and push organizations to build more resilience into their logistics strategies so they can keep delivering when conditions change.

Turning Vulnerabilities into Strategic Foresight

While these challenges raise complexity, they also emphasize the value of early planning and strong technical partnerships. Shippers are increasingly looking beyond transactional freight to work with carriers who can reduce vulnerability through early planning, accurate data and integrated coordination.

Strong technical acceptance processes, clear communication with terminals and proactive risk identification can turn uncertainty into predictable delivery. Organizations that treat special cargo as a strategic capability, not just an operational task, are better positioned to deliver megaprojects on schedule and respond to shocks with confidence.

How ONE Helps You Deliver Beyond in Special Cargo

Success in special cargo logistics requires more than moving an oversized load from origin to destination. It calls for coordinated planning, disciplined technical work and a clear understanding of local conditions at every touchpoint.

At ONE, we bring together global expertise, strong local partnerships and proven handling standards to help customers manage this complexity with confidence while keeping their most important investments moving forward and visibly delivering beyond.

Integrated Planning and End-to-End Orchestration

Every successful project begins long before cargo arrives at the terminal. ONE supports shippers from the initial planning phase until the final delivery. Our teams align technical drawings, equipment needs, lifting requirements and terminal constraints early, so cargo arrives load-ready and can move without surprises.

With our global expertise, we help customers avoid bottlenecks, manage timing across modes and ensure that critical components arrive at the right place, in the right sequence, at the right time, even when those components are oversized, sensitive or central to project go-live dates.

A Partnership Approach with Terminals and Local Authorities

Oversized cargo depends on coordinated execution across multiple stakeholders. ONE works closely with ports, terminals, surveyors, hauliers and local authorities to prepare each move. We confirm lifting gear, verify clearance limits, align permit requirements and plan handling procedures before cargo ever reaches the gate.

This partnership approach improves predictability, shortens lead times and helps customers minimize delays, especially in markets with strict regulations or limited heavy-lift capability.

Global Network, Local Expertise

Special cargo moves through diverse regions, each with its own equipment limits, infrastructure and operating rules. ONE combines a global network of vessels and regional Special Cargo teams with deep local knowledge gained from operating in more than 100 countries.

This blend of scale and local insight helps customers navigate the details that can affect an oversized move, from port-specific handling limits to inland road restrictions and local compliance requirements, turning complex corridors into stable, repeatable routes for high impact shipments.

Solutions Designed for You

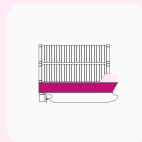
Every special cargo shipment is different. ONE delivers tailored solutions through a structured yet flexible booking process, providing clarity and expert support at every stage of the journey.



Initial Inquiry



Quotation



Space Confirmation



Technical Review



Documentation



Booking Confirmation



Pre-shipment Coordination



Load & Discharge

How ONE Simplifies Special Cargo



Special Cargo expertise

Dedicated specialists who guide each step, from planning and acceptance to lifting and stowage.



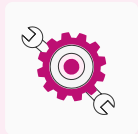
One-stop coordination

Spend less time managing multiple vendors and more time focusing on your core business.



Global access

A strong global network with deep local knowledge gained from operating in more than 100 countries.



Equipment when you need it

Flat racks and open tops positioned across regions and handled by trained teams.



Digital tools

First-of-its-kind online quoting, routes and schedules to speed up decisions and improve visibility.



Reliable scheduling

Frequent sailings and strong network coverage to keep projects on track.



Continuous investment

Expanding equipment pools, improving processes and training people to support future special cargo needs.



Proactive customer support

Clear communication, early visibility and hands-on guidance at every stage of the journey.

Behind the Strategy: Executive Perspectives



Matty van der Waal
Deputy General Manager,
Global Reefer and Special Cargo,
Ocean Network Express

As ONE's Global Head of Reefer and Special Cargo, Matty van der Waal has watched the sector evolve at speed, reshaping supply-chain planning, partner expectations and the global movement of project cargo. At the center of this shift, he says, is "the move to energy transition and the specialized cargo linked to it."

Renewable-energy projects, especially wind, now dominate demand, driving long-distance OOG movements on Asia–Europe, Asia–North America and Asia–Latin America routes. China leads the curve with rapid investment and large-scale deployment, while new manufacturing hubs across Southeast Asia continue to diversify origins.

New Pressures on Planning and Predictability

For special cargo, the gap between quotation and execution is widening. Unlike dry cargo, which often books within days, OOG shipments may take months to a year from planning to lift. Matty notes that "a very important element in special cargo is the significant lead time between the quotation and the actual shipment. Geopolitical shifts and route changes, such as diversions around the Cape of Good Hope, add further unpredictability.

Managing this complexity, he says, requires close coordination, and clear visibility across all touchpoints within the supply chain. Digital visibility tools, including ONE's near real-time schedule data and disruption alerts, help customers plan ahead. But as Matty stresses, technology supports the process, expertise secures the cargo.

Why Expertise Matters

Oversized cargo is unforgiving. One miscalculated lift, angle or lashing plan can compromise an entire shipment. According to Matty, "it is a field within the shipping business that requires a lot of expertise". Many members of ONE's special cargo team come directly from terminals and vessels, bringing practical insight when cargo dimensions push operational limits.

To scale this capability, ONE runs structured, hands-on training for commercial teams. "Experts from Singapore travel to these locations to lead a two-day course that showcases our capabilities," Matty explains. This builds consistent, technical know-how across all offices supporting project cargo.

A Network Ready for Shifting Production and Energy Hubs

Production is spreading across Asia, with Vietnam and Indonesia becoming key project cargo origins, while China remains both a manufacturing powerhouse and a major end market. ONE's deep presence in the region provides a built-in advantage, "we are already equipped and have good relationships established with all the ports," Matty says. Though policy changes in sectors like U.S. renewables can alter demand, the network is built to pivot. "Production is still keeping up," Matty notes, "but the volumes are shifting," highlighting the importance of a diverse global footprint.

Safety and the Most Common Point of Failure

The greatest recurring risk in special cargo is improper securing. Matty is clear: "What we've observed when shipments go wrong is that they often lack a proper lashing and securing plan". Without the correct documentation and preparation, cargo may be delayed, or declined. "For safety reasons, we always retain the authority to decline a shipment."

For shippers, the solution remains constant: early engagement, accurate drawings and continuous communication. As Matty puts it, "the best way to manage them is by having that contact between the shipper, the forwarder, and the shipping line to actually do the planning."

Special Cargo Shipments in Action



Special cargo moves are rarely straightforward. Whether biological, industrial or high-value, every shipment demands its own mix of engineering accuracy, sequencing discipline and real-time coordination. The following examples show how ONE applies that expertise to very different challenges, keeping complex, oversized and sensitive cargo moving safely, even when conditions shift.

Olive Trees: Transporting the Unexpected

Transporting live olive trees from Valencia to Nhava Sheva is not a typical project-cargo move, yet ONE made it possible. The trees traveled more than 45 days at sea without access to light or external water, relying on moisture retained in the root ball for survival.

ONE used a combination of open-top and flat-rack equipment to secure each tree upright, protect the root mass and maintain airflow, while avoiding pressure on the trunk. Despite the biological challenges, the trees arrived healthy, showing how ONE can adapt engineering-based handling standards to sensitive, non-industrial cargo through careful planning and specialized equipment use, delivering a larger than life outcome for a unique project.



OOG Machinery: Delivery Under Pressure

A machinery shipment from Hamburg to Pusan required rapid adjustment when cargo specifications changed close to loading. ONE's technical team rechecked the center of gravity, revised weight distribution and updated the lifting and securing plan in real time.

The team then coordinated a shift from a standard OOG approach to breakbulk loading, working with the terminal to ensure the revised plan could be

executed safely. Fast recalculation and disciplined acceptance checks kept the shipment on schedule and avoided what could have been a costly delay for the project's timeline.

Industrial Coolers: Absolute Precision

ONE transported eight oversized industrial coolers, each nearly 15 meters long and totaling about 135 tonnes. Twelve 40-foot flat racks were pre-positioned to match the support points of each unit and reduce handling risk during loading.

Because installation order mattered, ONE worked closely together with the shipper's transport team, terminal operations, and vessel stowage so each cooler arrived, loaded and discharged in the correct sequence. By synchronizing the customer's cargo delivery and port handling, ONE delivered a seamless move supporting tight installation timelines for a major industrial project and ensuring that critical capacity came online as planned.

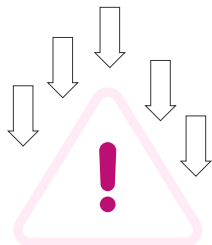
Yacht Transport: Precision Handling Across Continents

ONE transported an 8.5-ton Beneteau Oceanis 37.1 sailing yacht from Antwerp to Hong Kong, managing a delicate, oversized vessel with custom cradling, specialized lifting gear and careful structural protection throughout the move.

The yacht's 16-meter mast, nearly the length of six containers, added an extra layer of complexity that required precise load balancing and secure stowage for the long ocean crossing. By aligning equipment selection, terminal handling and vessel stowage, ONE delivered a seamless end-to-end transport, ensuring the yacht arrived safely, just as planned.

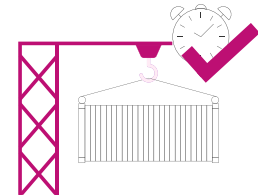
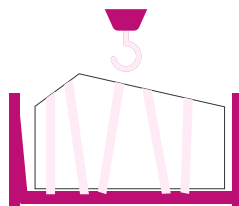
What These Shipments Demonstrate

Different cargo presents different challenges. Yet ONE's disciplined preparation ensures cargo moves safely, on schedule and without compromise.



Early technical acceptance reduces downstream risk

Equipment validation supports safe lifting and stowage

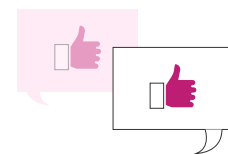


Terminal coordination removes handling constraints before arrival



Sequencing and inland planning keep project schedules on track

Adaptability prevents last-minute disruption



Clear communication keeps every stakeholder aligned

Every project carries its own mix of size, fragility, timing and regulatory requirements. These examples demonstrate how structured technical validation and coordinated execution, from planning through delivery, enable even unusual or high-profile cargo to move safely, reliably and at scale.

The Road Ahead



Rupesh Jain
Vice President,
Global Sales and
Customer Service Management,
Ocean Network Express

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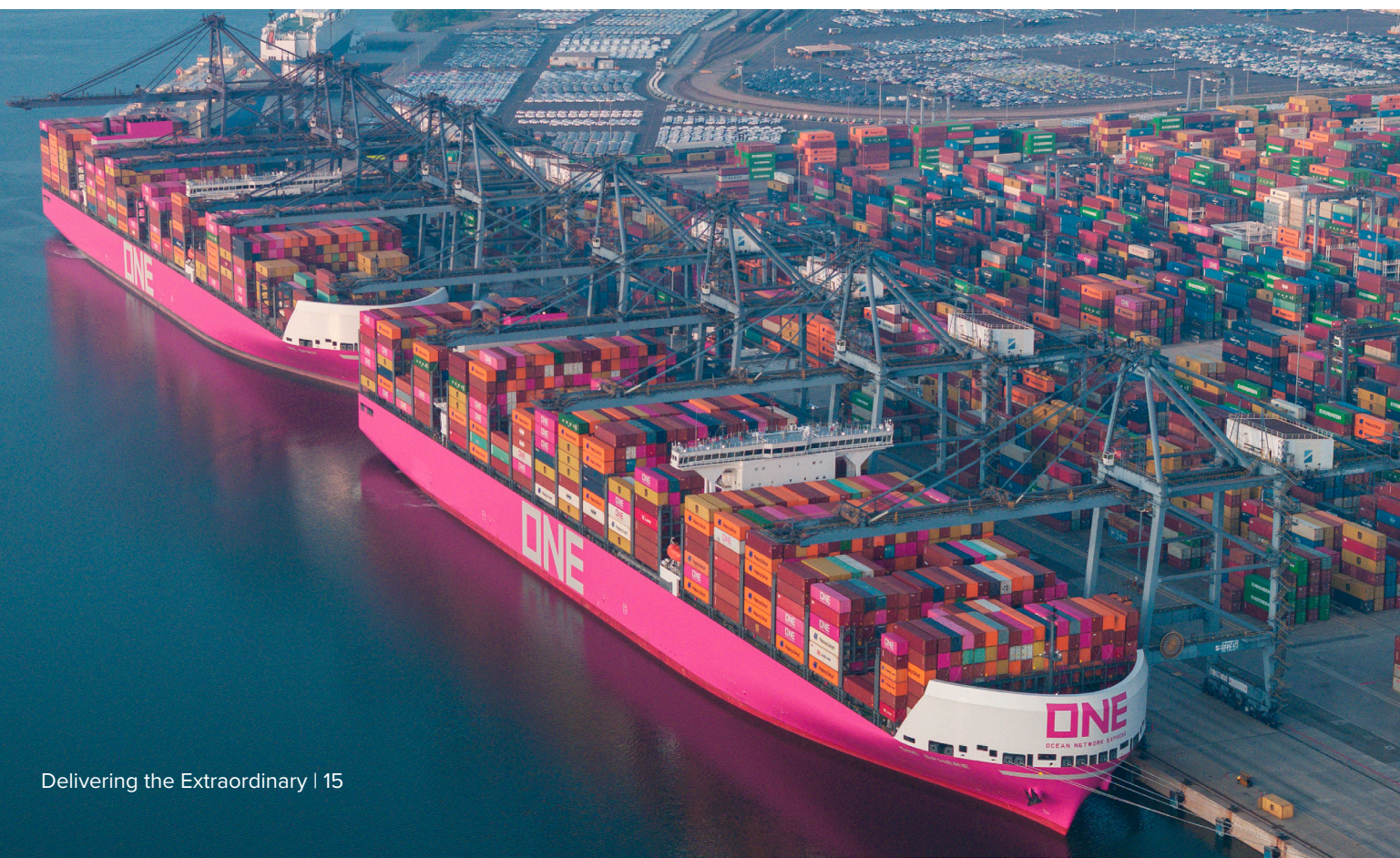
Moving special cargo is a team sport. Our role is to stay close to customers from the very start, understand what they're trying to achieve, and make the journey as smooth as possible. When Sales Planning and Customer Service work together, we can keep cargo flowing and give customers the confidence that their projects are in safe hands.”

Special cargo is becoming a core enabler of global progress. From renewable-energy expansion to industrial development and more resilient cities, the world's most ambitious goals depend on the safe movement of large, complex and high-value equipment. As countries scale clean power, build new infrastructure and diversify manufacturing, the ability to move oversized cargo reliably is now a strategic advantage, not a niche capability.

Reliable logistics supports sustainable development, improves economic access in emerging regions and accelerates innovation that depends on specialized equipment. Special cargo is no longer a niche activity. It sits at the heart of the world's shift towards cleaner energy, smarter industry and stronger global networks.

How Executives Can Build Stronger, More Agile Supply Chains

Looking ahead, leaders will face rising complexity, larger project scopes and continued uncertainty. With the right foresight and partnerships, these pressures can become opportunities to build resilience and long-term advantage.



Key Recommendations for Leaders



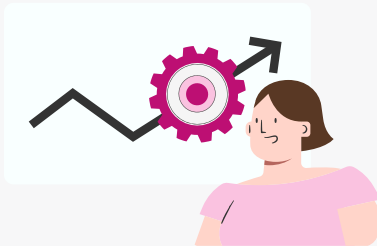
Choose partners who can adapt under pressure.

Geopolitics, weather and regulatory change will continue to reshape trade. Agility and clear communication will be essential.



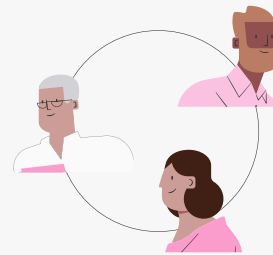
Treat resilience as a strategic capability.

Organizations that see logistics as a source of advantage, not only as a cost, will be better placed to compete and grow.



Invest early in technical preparation.

Accurate drawings, acceptance checks and feasibility reviews reduce risk and protect timelines.



Strengthen cross-functional collaboration.

Engineering, procurement, logistics and site teams should align early, guided by carriers who understand technical and operational risk.

A Shared Vision for the Future

The future of special cargo is one of possibilities. As global projects scale, the logistics behind them will determine how quickly new energy systems go live, how fast industries expand and how reliably communities gain access to infrastructure and technology.

ONE's mission is to support that progress. With engineering accuracy, a strong global network and a commitment to safe, predictable delivery, we help customers move the cargo that moves the world forward. When organizations combine preparation, partnership and resilience, special cargo becomes more than transport. It becomes a driver of innovation, progress and long-term growth.

Setting the Course for the Next Decade



Global projects are expanding. Timelines are tightening. The cargo required to build the next decade of infrastructure is growing in both size and complexity. Now is the time for leaders to rethink how special cargo fits into their long-term strategy.

Reliable special cargo logistics is no longer just an operational concern. It is a leadership decision that influences project timing, cost certainty and the ability to deliver on growth and sustainability goals. Forward-thinking executives are reassessing their networks, strengthening their partnerships and building more agility into every stage of the supply chain, so they can keep delivering at scale, even as conditions change. At ONE, we are committed to supporting this shift.

Our teams work alongside customers to clarify requirements, reduce risk and bring technical accuracy to every shipment, whether it is oversized, sensitive or high-value. We see our role as more than transportation. We aim to be a trusted partner who helps leaders plan with confidence, anticipate challenges and execute complex cargo moves with precision for projects that matter at the national, regional or global level.

Ready to Start?

The next decade of global growth will be built on the safe, predictable movement of special cargo. With the right preparation and the right partner, even the most complex moves become achievable.

Let's shape the future of special cargo, together and continue to deliver beyond with projects that feel truly larger than life.

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