SIGNAL AI

2026 GEOPOLITICAL RISK REPORT

TOP EMERGING RISKS IMPACTING BUSINESSES IN 2026

A cross-sector read on geopolitical tension and enterprise risk, built on Signal AI data across 50+ brands and 15 risk categories.

50+
Brands tracked across the dataset

40+
Risk events tracked across 15 categories

4M+
Articles on geoeconomic confrontation

Learn more about our solutions →

CONTENTS

What's in this report.

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EXECUTIVE SUMMARY

Geoeconomic confrontation is now the risk to plan around.

For the first time, the World Economic Forum ranks geoeconomic confrontation as the single most severe short-term global risk, ahead of extreme weather, misinformation, and armed conflict.

Signal AI's platform data shows the same shift inside enterprise risk signals: international trade, activism, and regulatory volume all rose sharply between Q4 2025 and Q1 2026, concentrated in a small set of industries with the least room to absorb the shock.

This report reads that shift across sectors. Using comparable, dated data rather than projections, it shows where exposure is rising fastest, which industries are most exposed today, and how fast narrative risk can move from signal to balance sheet.

METHODOLOGY

Signal AI's proprietary risk framework covers 40+ risk events across 15 categories of enterprise risk, built to surface risk signals tied to a company or industry, read across traditional media, regulatory content, and social media.

Figures compare Q4 2025 to Q1 2026 unless stated otherwise, across 50+ tracked brands .

WHAT YOU NEED TO KNOW:

01 A changed landscape

Geoeconomic confrontation displaces cooperative frameworks as the primary global risk, a first in the WEF's rankings.

02 Concentrated exposure

Trade and activism risk signals rose fastest in shipping, travel, and energy.

03 A monitoring gap

Most tracking is still retrospective. The data argues for predictive, continuous geopolitical risk intelligence.

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How to read this report.

METRIC	WHAT IT MEASURES	HOW TO INTERPRET IT
Net sentiment	% positive minus % negative across brand coverage	Scale -100 to +100. Higher = more positive overall coverage.
Tier 1 Penetration	% of articles in publications with ≥10M monthly visitors	Quality indicator — are the cuts reaching publications that move investors, policymakers, and talent?
Salience	Signal AI score based on mention position, prominence, and article length	How central the brand is to the article. High = brand is the subject, not a passing mention.

Our data.

The data behind every Signal AI decision

265,000+ sources across media, social, broadcast, and regulatory content, ingested in near real-time so you see what the world is saying as it's said.

AI-Powered Risk Intelligence

One platform ingesting 5.5M+ documents a day across 226 markets and 120+ languages, turned into intelligence you can act on.

Global reach. Near real-time.

The content that fuels AIQ: published media, social, broadcast, podcasts, and regulatory filings from 265,000+ sources worldwide.

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SECTION 01 · THE RISK LANDSCAPE IN 2026

A CHANGING LANDSCAPE

WHAT CHANGED

From 2025 to 2026: A Structural Shift in What Leaders Fear Most.

Geoeconomic confrontation became the top global risk in 2026, ahead of interstate conflict, extreme weather, and polarization.

The shift that matters for risk teams is compounding. Economic and technological risks have caught up with the geopolitical ones and now amplify them: a tariff shock feeds inflation, inflation feeds instability, and AI exposure sits underneath all three. That interaction, not any single event, is what makes 2026 structurally more fragile than 2025.

Source: World Economic Forum, Global Risks Report 2026

Short-term turbulence surges

Over half of surveyed leaders now expect a stormy or turbulent two years ahead, up 14 points on last year.

Geoeconomic confrontation tops the list

Cooperative global mechanisms are fracturing. Geoeconomic confrontation is now the single most severe short-term risk.

Environmental risk deprioritised

Under fiscal and geoeconomic pressure, short-term environmental risk has been pushed down the list — long-term threats persist.

AI anxiety rising long-term

Adverse long-term AI consequences saw the sharpest rise in severity of all 33 risks the WEF evaluated.

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Five regional flashpoints, five different mechanisms of risk.

01 Middle East

A precarious Gaza ceasefire and rising tension across Israel, Lebanon, Syria, and Iran. A renewed Strait of Hormuz closure threatens global energy security and oil-price stability.

02 United States

Eroding institutional checks and weaponised state machinery are fragmenting alliances and the rules-based order, opening security vacuums and weakening collective responses.

03 Europe

Russia has shifted from kinetic war in Ukraine to hybrid attacks on NATO supply lines, politics, and infrastructure, testing Europe's unity and security gaps.

04 Asia-Pacific

India–Pakistan tensions, following their brief 2025 conflict, open the door to potential disruption of global trade routes.

05 Latin America

A high-likelihood, high-impact contingency: potential U.S. military intervention in Venezuela, risking overstretch of U.S. defence resources.

05 So what?

These five flashpoints share one mechanism: each raises the cost of moving goods, capital, or trust across a border. For exposed sectors, the question is no longer which single event lands, but how many run at once.

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Where disruption becomes opportunity

Each of these three plays follows the same logic: fragmentation raises the cost of staying centralised, so the winners are firms that sell resilience itself (localisation, security, and predictive infrastructure) rather than trying to out-compete the disruption directly.

01

Technology & semiconductors

Fragmentation is a commercial driver for firms that help enterprises "friendshore", localised resilience, automation, and predictive logistics.

02

Artificial intelligence

Rising demand from governments and enterprises to shield critical infrastructure creates a market for air-gapped deployment and localised ownership models.

03

Automotive

Unpredictable trade penalties reward automakers who localise production inside their primary consumer markets rather than centralising it.

Shifting from reaction to prediction

These three findings compound. The top risk has changed, it is hitting brand-level risk profiles directly, and most organisations are still measuring it with tools built for a slower world. Supply-chain adjustments alone don't offset a shift in the underlying risk profile. The response is continuous, predictive monitoring that surfaces emerging narratives before they reach the balance sheet.

01

Geoeconomic confrontation is a first-time #1 risk

The WEF's Global Risks Report 2026 names it the primary near-term risk, with 18% of respondents citing it as a plausible cause of global catastrophe this year. Signal AI tracked it as the highest-volume topic on our platform between January and May 2026.

02

Brand risk profiles are increasingly geopolitical

Both governments and private enterprises report growing difficulty building resilience. Supply-chain adjustments alone don't fully offset the shift in underlying risk profile.

03

Monitoring is structurally behind

Most tracking focuses on events that already happened. Managing geopolitical risk requires identifying emerging narratives and risk vectors before they materialise — not after.

SECTION 01 · THE RISK LANDSCAPE IN 2026

TOP EMERGING RISKS

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Top 5 emerging risks

The top three (trade, regulatory, geopolitical) share one root cause: unilateral state action on tariffs, sanctions, and market access. Activism and people & HR run on a separate, domestic track. That distinction matters operationally: the first cluster is best watched at the border and the policy desk, the second inside your own workforce and stakeholder base.

#	RISK	DEFINITION	GROWTH
1	**International trade risks**	Challenges and negative impacts organisations face conducting business across international borders.	**+41.8%**
2	**Activism risk**	Organised advocacy and protest from external groups or investors targeting a company's practices or strategy.	**+37.4%**
3	**Regulatory risks**	Compliance failures or industry regulatory change affecting business operations or strategy.	**+26.2%**
4	**Geopolitical risks**	Regional conflict, political instability, and international tension threatening operations and market access.	**+25.8%**
5	**People & HR risks**	Workplace challenges related to labour practices, employee relations, and organisational culture.	**+14.4%**

Growth = % change in media mentions volume, Q4 2025 to Q1 2026

% Δ EXPECTED MEDIA EXPOSURE VS. BENCHMARK, Q1 2026

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Where each top-5 risk is concentrated by industry.

RISK \ INDUSTRY	Tech & Semis	Pharma	Energy & Infra.	Agri./Chemicals	Construction	Travel	Shipping
International trade	- 91%	- 71%	+14%	+5%	- 100%	- 55%	- 60%
Activism	- 27%	+4,983%	- 29%	+221%	- 100%	+28%	+32%
Regulatory	- 76%	- 81%	- 19%	- 63%	- 79%	+117%	- 82%
Geopolitical	- 89%	- 7%	+14%	+17%	- 98%	- 57%	- 60%
People & HR	+4,064%	- 81%	- 99%	- 98%	+5,129%	- 94%	+4,356%

Cell colour reflects magnitude of change, regardless of direction (light = under ±30%, mid = ±30–99%, dark = ±100%+). Source: Signal AI platform. Values above ±500% reflect movement from a very small baseline and are directional only.

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International trade risk.

Trade risk rose fastest where a single chokepoint sets the cost base. Shipping and travel both pass fuel and routing costs straight through to the customer, so coverage tracks the disruption almost in real time.

+4.7x	**Shipping** 67.5K → 313.7K	Red Sea re-escalation threatened the Strait of Hormuz in March. Carriers permanently rerouted via the Cape of Good Hope, absorbing 5–7% of global capacity and adding 10–14 days to Asia–Europe voyages.	**NS 3.4%**
+2.1x	**Travel** 81.5K → 168.0K	Jet fuel price squeeze pushed Brent crude to $80–85 per barrel, threatening Q1 margins for European airlines, while sea-air transshipment demand created bottlenecks at Dubai and Singapore.	**NS 40.1%**
+1.9x	**Energy & commodities** 297.0K → 575.3K	European gas shock: prices spiked from €27–32/MWh to €60–65/MWh by early March. The Strait of Hormuz alone carries 20% of global petroleum liquids.	**NS -8.5%**

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Activism risk.

Activism risk is the clearest case of a domestic driver producing cross-sector exposure. Labour disputes, boycotts, and reputational reckonings are hitting agriculture, pharma, and shipping, industries that don't usually screen high on geopolitical risk.

LARGEST MOVER · SHIPPING

+2.9x

Mention volume, Q4 2025 → Q1 2026 · 1,437 → 4,161

Port and logistics chokepoints: immigration backlash following the Minneapolis ICE shooting produced coordinated blockades at ports and transit hubs.
Bilateral consumer boycotts: a Q1 trade dispute led more than half of Canadian consumers to replace US imports, shifting shipping volumes.

NS differential **7.9%**

Activism risk is driven less by cross-border policy than by domestic labour disputes and reputational reckonings, and it's hitting industries outside the usual geopolitical exposure list.

+2.3x

Agriculture & chemicals

The César Chávez reckoning: the United Farm Workers cancelled tributes to its co-founder after historic abuse allegations surfaced, prompting sponsorship reviews. NS -45.2%.

+2.1x

Pharma

Civil rights and health equity: the passing of prominent civil rights figures revived campaigns on racial disparities in drug pricing. Consumer litigation over OTC ingredients added pressure. NS -5.1%.

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Regulatory risk.

Regulatory risk here is largely one decision working through the system. A single ruling on tariff authority reset the compliance calculus for shipping, energy, and travel within weeks, a reminder that regulatory risk can be as sudden as any geopolitical shock.

SHIPPING

+2.7x

72.7K → 192.6K · NS -2.4%

Supreme Court IEEPA ruling: a 6–3 decision restricting IEEPA prompted a 10% global tariff, disrupting ocean carriers immediately.
Sanctions enforcement: Treasury intensified action against vessels transporting sanctioned Iranian crude.

ENERGY & COMMODITIES

+1.3x

348.4K → 455.8K · NS 32.4%

CFIUS divestment precedent: the DOJ's first federal lawsuit enforcing a divestment order reshapes cross-border tech M&A risk.
EU AI Act: a new deadline for high-risk energy systems forces smart-grid alignment with European safety standards.

TRAVEL

+1.2x

137.5K → 163.8K · NS -5.5%

EU tech regulation: Booking.com's Data Portability API responds to its Digital Markets Act "gatekeeper" designation.
Sanctions and border scrutiny: a new UK licence for Russian crude-derived fuel complicates airline compliance.

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Geopolitical risk.

Geopolitical risk shows the tightest link between a single event and global logistics. A Hormuz disruption doesn't stay regional: it moves energy prices, cargo routing, and food inflation at once.

+5.0x

Mention volume, Q4 2025 → Q1 2026 · 62.9K → 311.8K · NS 4.4%

A direct read on the Hormuz blockade's grip on global energy and cargo logistics: March strikes triggered a blockade halting 20% of global energy traffic. A US raid targeting Maduro added a heavy naval presence in the Caribbean, forcing merchant fleets to adapt on two fronts at once.

Agriculture & chemicals

+2.2x

GCC "grocery supply emergency" disrupted 70% of imports, spiking food inflation 40–120%. NS -6.5%.

Energy & commodities

+2.0x

Hormuz freeze drove Brent to $100–120/barrel; Ras Laffan strikes cut production 17%. NS 42.0%.

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People & HR risk.

This is the one top-5 risk driven from inside the organisation. AI-led restructuring is now generating its own labour-relations exposure in tech, alongside physical fatigue building in shipping and construction.

+2.0x

Shipping (214 → 423, NS -13.1%)

Seafarer burnout from Cape of Good Hope rerouting drove contract extensions and whistleblower reports; Lufthansa-linked crew swap gridlock strained Maritime Labour Convention compliance.

+1.3x

Technology & semiconductors (18.2K → 24.2K, NS -19.4%)

An AI-realignment layoff shock triggered 52,000–80,000 tech job cuts, the highest since 2023, with whistleblowers alleging "AI workflow automation" as cost-cutting cover.

+1.3x

Construction (92 → 121, NS 19.5%)

A London Underground dispute over a shortened work week threatened shutdowns, and trade groups reported rising burnout tied to overtime under compressed timelines.

THE ONE SECTOR IN EVERY TOP-5 RISK

Shipping sits at the intersection of every major 2026 risk.

No other industry appears in all five. For a risk team, shipping is the natural first place to test a predictive approach: it's where geopolitical, trade, regulatory, activism, and labour risk converge, and where early warning has the most operational value.

+5.0x

Geopolitical risk mention volume, shipping

+4.7x

International trade risk mention volume, shipping

+2.9x

Activism risk mention volume, shipping

+2.7x

Regulatory risk Mention volume, shipping

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SECTION 01 · THE RISK LANDSCAPE IN 2026

FIVE THINGS TO DO WITH THIS DATA

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Five things to do with this data.

01
Plan for chokepoint weaponisation.

Price a "weaponisation premium" into every chokepoint you depend on.

02
Expect coercive statecraft.

Tariff and access rules can shift within weeks. Write volatility clauses into contracts.

03
Reassess alliance shifts.

Track which corridors get built, but don't model any one alignment as permanent.

04
Re-architect supply chains.

Dual-source critical inputs, and genuinely regionalise rather than just reroute.

05
Build resilience into planning.

Hold larger liquidity buffers and embed geopolitical risk at board level.

HOW SIGNAL AI HELPS

Signal AI helps risk teams detect emerging threats early, measure exposure against industry benchmarks, and assess the impact, velocity, and spread of known risks, so the response is evidence-led, not reactive.

NEXT STEPS

See where your risk exposure sits right now.

Signal AI's AIQ engine turns external data from traditional and social media, across 226 markets and 120+ languages, into intelligence you can act on, so you see reputational and geopolitical shifts as they form. Fortune 500 leaders and 800+ customers worldwide rely on Signal AI.

LEARN MORE ABOUT OUR RISK PROPOSITION

See how Signal AI tracks geopolitical risk signals for your sector, in real time.