



## **Market Insight Brief – January 2026**

This Market Insight Brief provides a concise, cross-sector snapshot of current market conditions across IDC's four core business sectors: Real Estate, Energy, Digital Economy, and Global Trade. The brief is designed to inform project sponsors, partners, and capital providers evaluating near- and mid-term opportunities.

### **REAL ESTATE**

U.S. real estate markets are entering a more disciplined phase following several years of rapid pricing expansion. Multifamily supply remains elevated in select growth markets, placing emphasis on lease-up execution, tenant retention, and operational efficiency. Buyer competition has moderated, creating selective opportunities for well-capitalized sponsors with strong underwriting and execution capabilities. Workforce housing, build-to-rent, and carefully structured value-add strategies continue to present compelling risk-adjusted profiles when paired with realistic capital expenditure planning and absorption assumptions.

### **ENERGY**

Energy markets are adjusting to a lower forward price environment, with oil prices forecasted to soften into 2026 as supply growth outpaces demand. Despite lower crude pricing, downstream and refining margins are expected to remain resilient, favoring projects with strong operational fundamentals and clear feedstock and offtake strategies. Capital deployment is increasingly selective, favoring experienced operators, proven technologies, and projects that demonstrate permitting readiness, margin protection, and financeable contract structures.

### **DIGITAL ECONOMY**

The digital economy continues to evolve from experimental innovation toward institutional adoption. Tokenization and digital representations of real-world assets are gaining traction as compliant structures, governance frameworks, and reporting standards improve. Market participants are shifting focus from novelty-driven applications to systems that enhance transparency, capital efficiency, and investor access. Digital infrastructure is increasingly viewed as a complement to traditional finance rather than a replacement, particularly when integrated into real estate, energy, and trade-related capital stacks.

## **GLOBAL TRADE**

Global trade growth remains steady but measured, influenced by geopolitical tension, trade policy uncertainty, and evolving supply chain dynamics. Logistics markets are stabilizing, with capacity and pricing normalizing across key lanes. In this environment, counterparties that demonstrate compliance discipline, logistical control, and trusted international relationships are better positioned to execute transactions efficiently. The premium in global trade is shifting toward reliability, transparency, and risk management rather than pure volume growth.

## **SUMMARY PERSPECTIVE**

Across all four sectors, IDC observes a common theme: execution matters more than optimism. Markets are rewarding sponsors who can combine sector expertise, credible technical partners, disciplined financial structures, and realistic timelines. IDC's collaborative model is positioned to help projects transition from concept to bankable opportunity by aligning technology, capital, and experienced partners to deliver scalable, real-world outcomes.

**IDC's advantage remains the same:** we bring sector expertise, qualified technical partners, and structured finance to the table—so projects move from “**in the works**” to **bankable outcomes**.