CLIENT BRIEFING | 25 SEPTEMBER 2026

Middle East Port and Shipping Situation

Implications for imports from Asia and Australia

Executive summary

The Iran conflict has materially disrupted container shipping into the Arabian Gulf. The Strait of Hormuz is not formally closed, but vessel traffic remains severely restricted, security-dependent and unpredictable. Recent commercial movements have been a fraction of pre-conflict levels, with some vessels operating without normal tracking signals and others awaiting clearance or diversion instructions.[1]

The operational distinction is important: most Gulf terminals remain open, but many are no longer reliably accessible through scheduled mainline services. Carriers are omitting calls, diverting containers to contingency ports, storing cargo in transit and applying emergency freight, fuel and war-risk charges.[2][3]

For imports from China, Southeast Asia, India and Australia, the most dependable current strategy is to use an Arabian Sea gateway outside Hormuz - principally Khor Fakkan, Fujairah or Sohar - followed by bonded road transport into the UAE or wider GCC.

Current operating picture

- Hormuz remains passable only on a limited and inconsistent basis; a confirmed booking does not guarantee a normal Gulf port call.
- Jebel Ali and other Gulf terminals may be open landside while ocean access and sailing frequency remain heavily constrained.
- Alternative gateways are absorbing additional volume, creating congestion, equipment pressure and longer inland movements.
- The Red Sea is an alternative corridor, but Bab el-Mandeb security has deteriorated and should not be treated as risk-free.[7]

Port impact overview

Gateway	Current condition	Operational effect
Iranian Gulf ports	Severely affected	Direct exposure to military activity, sanctions, insurance restrictions and carrier withdrawal. Not dependable for normal liner planning.
Jebel Ali and UAE Gulf ports	Open but heavily constrained	Fewer vessel calls, diversions, longer transit times and growing reliance on Khor Fakkan, Fujairah and Oman.
Dammam and Jubail	Open but Hormuz-dependent	Irregular services, emergency-routing charges and greater use of landbridges from Oman, UAE east coast or the Red Sea.
Hamad and Doha	Open but Hormuz-dependent	Limited direct access; dependence on occasional vessel transits, feedering and road alternatives through Saudi Arabia.
Bahrain	Open but Hormuz-dependent	Reduced direct reliability; road options from Oman or UAE require movement through Saudi Arabia.
Shuwaikh and Shuaiba	Open but Hormuz-dependent	Lower sailing frequency, possible contingency storage and lengthy road routing through Saudi Arabia.

Gateway	Current condition	Operational effect
Umm Qasr	Open and highly exposed	One of the most difficult upper-Gulf destinations; diversion and long-distance road recovery are increasingly likely.
Khor Fakkan and Fujairah	Open outside Hormuz	Practical UAE alternatives, but capacity, equipment and inland-transfer availability need confirmation.
Sohar	Open outside Hormuz	Strongest all-round alternative for Gulf distribution; direct Arabian Sea access and improving road and feeder connectivity.
Salalah and Duqm	Open outside Hormuz	Useful mainline, project and contingency gateways; longer inland distance to UAE and upper-Gulf markets.
Jeddah and King Abdullah Port	Open outside Hormuz	Viable for Saudi and landbridge cargo, but exposed to Bab el-Mandeb and Red Sea disruption.

How the disruption is manifesting

- Cancelled or omitted Gulf port calls and rolling changes to published schedules.
- Containers discharged at contingency ports rather than the contractual destination.
- Greater dependence on Khor Fakkan, Fujairah, Sohar and Salalah.
- Bonded trucking between alternative gateways and the UAE, Saudi Arabia and upper-Gulf markets.
- Longer booking lead times, weak arrival-date confidence and reduced suitability for JIT cargo.
- War-risk premiums, emergency freight charges and fuel surcharges.
- Higher demurrage, detention and storage exposure when cargo is held in transit.
- Tighter acceptance criteria and higher costs for dangerous goods, reefer and special equipment.

Published carrier cost indicators

Maersk's published contingency framework has included emergency freight charges of US$1,800 per 20-foot dry container, US$3,000 per 40-foot dry container and US$3,800 for reefer, special or dangerous-goods equipment. A further US$1,000 per container has applied where a vessel transits Hormuz. Storage charges may apply after the initial contingency-storage period.[4]

CMA CGM announced an emergency fuel surcharge effective 1 October 2026 of US$265 per TEU for dry head-haul cargo and US$320 per TEU for reefer cargo, in addition to other contingency, security and local charges.[5]

Options outside the Strait of Hormuz

Gateway	Best use	Advantage	Constraint
Khor Fakkan	UAE cargo and selected GCC movements	Shortest practical road connection into Dubai, Sharjah and the Northern Emirates.	Finite capacity; confirm bonded transfer, equipment and truck slots.
Fujairah	UAE, project and selected breakbulk cargo	Avoids Hormuz and offers direct UAE road access.	Smaller container network and less frequency than Jebel Ali.
Sohar	UAE, eastern Saudi Arabia and upper Gulf	Best balance of Arabian Sea access, container infrastructure and GCC road connectivity.	Increasing demand may tighten space and inland capacity.
Salalah	Asia or Australia transshipment and critical multimodal cargo	Major mainline position; supports sea-air, air-sea and regional contingency solutions.[3]	Long road distance to the UAE and upper Gulf.

Gateway	Best use	Advantage	Constraint
Duqm	Project, machinery and selected breakbulk	Secure position outside Hormuz with room for specialist handling.	Limited scheduled-container connectivity.
Jeddah or King Abdullah Port	Western and central Saudi Arabia; possible eastbound landbridge	Avoids Hormuz and provides Saudi domestic road connectivity.[6]	Asia and Australia routings normally require Bab el-Mandeb transit.

Recommended routing by destination

Destination	Preferred gateway	Onward movement
UAE	Khor Fakkan, Fujairah or Sohar	Bonded road delivery to Dubai, Abu Dhabi or final consignee.
Eastern Saudi Arabia	Sohar, Khor Fakkan or Fujairah	Road delivery to Dammam, Jubail or Eastern Province.
Central and western Saudi Arabia	Jeddah or King Abdullah Port	Saudi domestic road delivery, subject to Red Sea security.
Qatar and Bahrain	Sohar or UAE east coast	Bonded road movement through the UAE and Saudi Arabia.
Kuwait	Sohar or UAE east coast	Longer road movement through Saudi Arabia; border capacity must be reserved.
Iraq	Route-specific	Consider Sohar/UAE via Saudi-Kuwait, Jeddah landbridge, Aqaba or a Turkish gateway depending on final destination.

Considerations for imports from Asia and Australia

Cargo originating in Asia and Australia is comparatively well positioned to divert to Oman or the UAE east coast because these gateways can be reached from the Indian Ocean without entering Hormuz.

Australian services frequently depend on transshipment through Singapore, Port Klang, Colombo or another Asian hub. Routing instructions should therefore be changed before the container is loaded onto a Gulf-bound feeder. Once cargo has entered a carrier's Gulf contingency network, change-of-destination, storage and handling costs can escalate quickly.

Booking controls

- Confirm the actual port of discharge, not only the contractual final destination.
- Establish whether Hormuz or Bab el-Mandeb transit is required.
- Confirm whether the routing is direct, feedered or subject to contingency discharge.
- Obtain the full schedule of emergency, fuel, security, inland and war-risk charges.
- Confirm free storage time and responsibility for demurrage and detention at the contingency port.
- Reserve bonded-road capacity and validate border-clearance arrangements before vessel loading.
- For critical parts, medical cargo and JIT materials, compare sea-air or direct air freight rather than relying on an uncertain Gulf arrival.

Operational recommendation

For containerized imports from Asia and Australia, the preferred current model is an outer-Gulf gateway combined with a controlled inland solution. Khor Fakkan and Fujairah are attractive for UAE cargo, while Sohar offers the strongest broader-GCC alternative. Salalah is valuable for mainline connectivity and multimodal recovery, although its inland distance is substantial.

The Red Sea should be treated as an additional risk corridor rather than a fully secure substitute. Critical supply chains should maintain at least two viable gateways, carry additional regional inventory and avoid concentrating all urgent cargo through either Hormuz or Bab el-Mandeb.

Outlook

Iran has proposed a mechanism intended to reopen Hormuz within seven days, but this remains a diplomatic proposal rather than an established shipping arrangement.[8] It should not yet be used as the basis for firm operational planning.

The prudent assumption is that Hormuz access will remain intermittent, expensive and vulnerable to renewed escalation. Planning should therefore continue around alternative gateways, bonded landbridges, additional lead time and selective use of air freight for high-consequence shipments.

Sources

[1] Reuters, Vessels trickle through Strait of Hormuz as Middle East conflict persists, 21 September 2026

[2] Financial Times, The Gulf cargo trade that vanished, 20 September 2026

[3] Maersk, Red Sea Gulf of Aden and Hormuz situation updates

[4] Maersk, Middle East Operational Update 40, 22 July 2026

[5] CMA CGM, Middle East Situation Updates, updated 23 September 2026

[6] CMA CGM, Connecting the Middle East multimodal corridors and inland solutions

[7] Associated Press, The Houthi advance in Yemen raises concerns about a key shipping choke point, September 2026

[8] Al Jazeera, What's in Iran's seven-day plan to reopen the Strait of Hormuz, 25 September 2026

Important: The security and carrier operating environment is changing rapidly. Routing and cost information should be reconfirmed with the nominated ocean carrier and inland provider before each shipment is booked.