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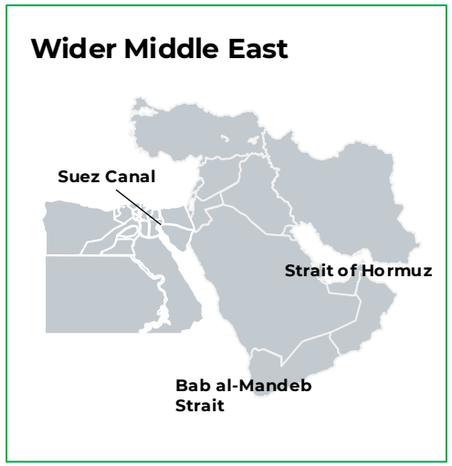
MIDDLE EAST FREIGHT REPORT

THIS REPORT IS DESIGNED TO PROVIDE A SNAPSHOT OF DATA TO AID CONVERSATIONS WITH FREIGHT FORWARDERS AND LOCAL PARTNERS.

THE REPORT WAS LAST UPDATED ON 18 SEPTEMBER 2026

Map of Key Ports and Straits in GCC

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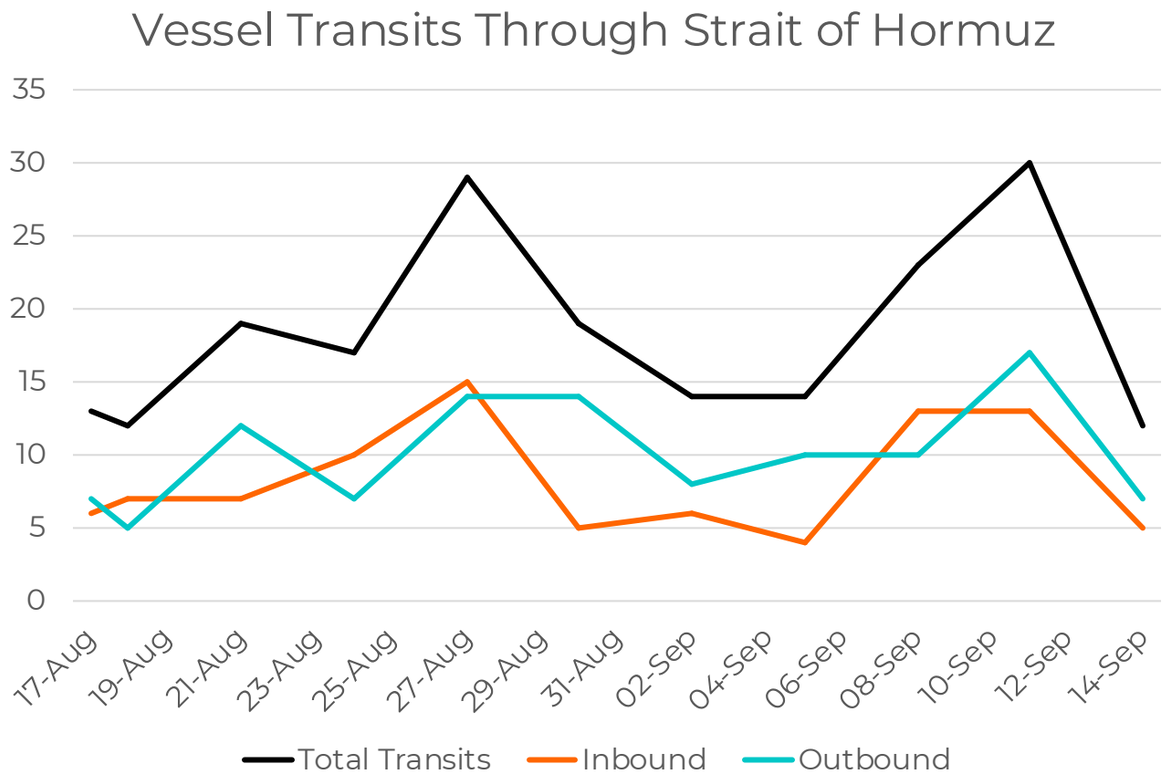


Bahrain	
Iraq	
Kuwait	
Oman	
Qatar	
Saudi Arabia	
UAE	

Strait of Hormuz Status and Sea Freight Disruption

Current Situation

- Commercial shipping through the Strait of Hormuz remains severely disrupted, with vessel transit volumes significantly below normal levels a Gulf tensions and conflict-related security risks continue to affect operators' confidence and routing decision.
- Freight reliability remains challenged, with some vessels avoiding the route, using alternative corridors, or reducing Automatic Identification System transmissions (“dark” transits), making movements less predictable and contributing to ongoing schedule uncertainty.
- Costs and risk premiums remain elevated, including higher war-risk insurance costs and security-related operating expenses, which continue to put upward pressure on ocean freight costs and transit decision-making.
- For New Zealand exporters, supply chain disruption remains a key watchpoint, although some cargo movements into GCC markets continue.



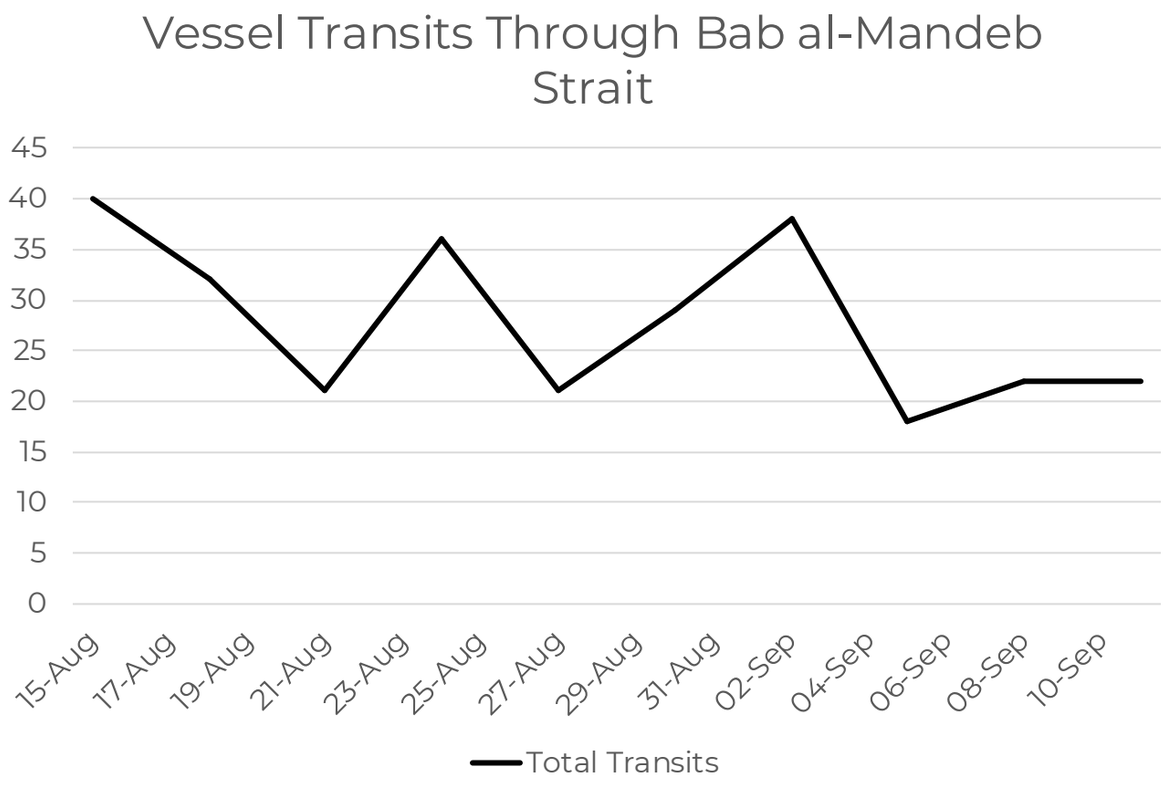
Data Sources: Hormuz Live Vessel Traffic & Crude Oil Prices | ShipFinder, Number of ships transiting Strait of Hormuz falls to three on September 16, data shows - The Hindu, Hormuz Shipping Traffic Falls to Single Digits, Data Shows, Strait of Hormuz shipping update, early September 2026 - Maritime News, Strait of Hormuz Closed, Day 201 | Live Tracker & Monitor

*As at 18 September 2026

Bab al-Mandeb Strait Status and Sea Freight Disruption

Current Situation

- The Bab-al Mandeb Strait remains open but is operating under heightened security risk, with Houthi forces now controlling key areas along Yemen's Red Sea coastline and strategically important positions near the strait, increasing concerns for commercial shipping.
- Shipping traffic remains well below historical levels, with recent vessel movements averaging around 26-31 vessels per day compared with pre-crisis averages of approximately 70 vessels per day, reflecting ongoing carrier caution and risk management measures.
- Sea freight costs and transit times remain elevated, as many carriers continue to reroute vessels around the Cape of Good Hope or transit the Red Sea selectively, leading to longer voyages, higher insurance premiums, and reduced schedule reliability.



Data Sources: Strait of Hormuz, Suez & Red Sea Live Ship Traffic — Shipping Chokepoint Tracker, Red Sea nations watch as Houthis seize Bab al-Mandeb strait | Houthis | Al Jazeera, Houthis seize key Yemeni island in Bab el-Mandeb, taking control of the strait, Red Sea and Bab el-Mandeb: Fuel Price Status | GOS, Bab el-Mandeb traffic falls sharply to around 26 vessels a day, Bab Al-Mandeb Shipping Traffic Slumps as Houthi Advance Raises Red Sea Risks | arabtimes, Red Sea shipping update amid Bab el-Mandeb slowdown - Maritime News

*As at 18 September 2026

GCC Ocean Freight Operational Status

- Shipping companies are continuing to operate in the region but under significant restrictions, with a range of cargo booking suspensions still in place for several Gulf destinations and cargo types. Alternative routings, landbridge solutions, and transhipment hubs such as Salalah, Sohar, Khor Fakkan, and Jeddah are being used to maintain cargo flows.
- Supply chains remain disrupted and more expensive, with Emergency Freight Rates applying across affected Gulf markets and additional fees for shipments transiting the Strait of Hormuz. Alternative routing, temporary storage, insurance costs, and crew risk compensation continue to drive higher freight costs.
- Contingency measures remain widespread across the Gulf, including temporary pauses on some landside movements, rerouting through Saudi and Oman, special handling arrangements for critical food and medical cargo, and ongoing adjustments to empty-container return procedures to maintain network stability and cargo safety.

PORT GROUP	STATUS	FUNCTION IN NETWORK	CONSTRAINT TYPE
UAE (Jebel Ali, Khalifa, Fujairah, Khor Fakkan, Hamriyah, Sharjah)	Fully operational, with congestion at Fujairah & Khor Fakkan	Primary hub, diversion and landbridge gateway for Gulf cargo	Operational but experiencing congestion, capacity controls, rerouting requirements and cargo booking restrictions depending on cargo type
Oman (Sohar, Salalah)	Operational	Transhipment buffer and contingency hub outside Hormuz	Key contingency hub supporting alternative routings, with security requirements and some cargo booking restrictions by commodity and destination
Saudi Arabia (Jeddah, Yanbu, Dammam)	Operational, some ports congested	Alternative Gulf & Red Sea gateway, bypassing Hormuz dependency	Jeddah operating as key Red Sea gateway and landbridge node; some congestion, rerouting requirements and cargo-specific booking restrictions remain
Qatar (Hamad)	Operational with alternative reroutings and landbridge solutions	Secondary Gulf gateway; reliant on selective routings	Operational with selective routing, cargo specific booking restrictions and continued contingency transport arrangements
Kuwait (Shuwaikh, Shuaiba)	Operational with elevated security controls; Shuaiba vessel movements may be restricted	Direct northern Gulf gateway	Operational but affected by emergency freight surcharges, alternative routing requirements and cargo booking restrictions remain in place.
Bahrain	Operational with restrictions	Small Gulf feeder gateway	Operational feeder gateway, subject to selective routing and cargo booking restrictions

*As at 17 September 2026

Date Source: Red Sea / Gulf of Aden situation | Maersk

GCC Air Freight Operational Status

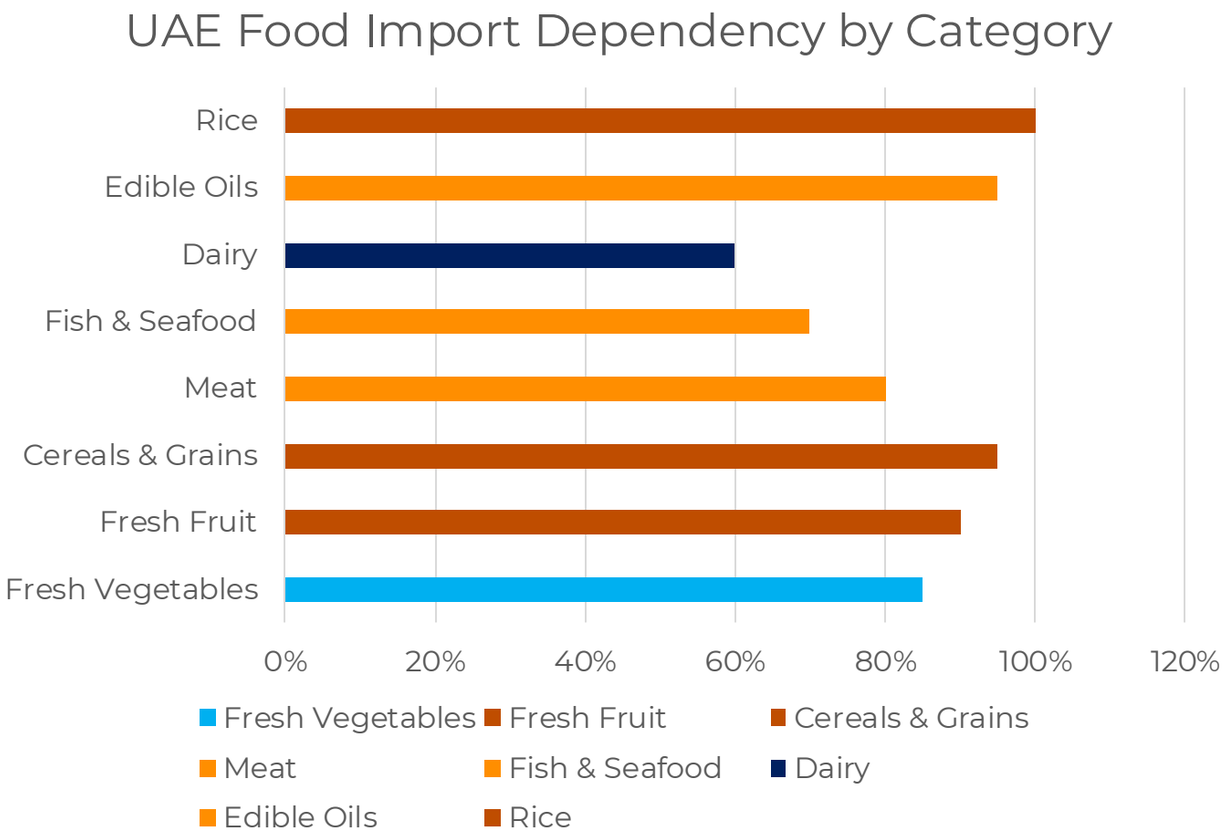
- Air cargo networks across the GCC remain operational, but under restrictions. There are no broad regional airspace closures, however airlines continue to operate under enhanced security measures, with tactical rerouting, flow controls, GPS interference risks, and short-notice schedule changes affecting flight operations.
- Key GCC hubs continue to function, although with airspace limitations. Qatar's airspace remains partially closed with flights restricted to approved corridors, Kuwait permits only approved arrivals and departures, UAE airspace is partially reopened with controlled routing, while Saudi Arabia and Oman remain important operational and rerouting hubs.
- Capacity is available but remains constrained and subject to change. Major regional carriers including Emirates SkyCargo, Etihad, Qatar Airways, Cargo, Gulf Air and Saudia Cargo continue operating, although schedules, frequencies and cargo acceptance remain dependent on evolving security conditions and regulatory approvals.

COUNTRY	AIRPORTS	AIR SPACE OPEN/CLOSED	AFFECTED AIRPORTS
Bahrain	BAH	Open, enhanced monitoring and routing measures in place	BAH
Oman	MCT, SLL	Open and operational	MCT, SLL
Kuwait	KWI	Restricted; approved arrivals/departures only, overflights suspended, tactical routing and GPS interference possible	KWI
Qatar	DOH	Partially closed; flights limited to approved corridors and routing points	DOH
Saudi Arabia	RUH, JED, DMM	Open; congestion and rerouting possible	DMM, RUH, JED
UAE	AUH, DXB, DWC, RAK, SHJ	Partially reopened; approved flight corridors, flow controls and delays possible	All

*As at 16 September 2026

Date Source: Middle East Operational Update - September 16, 2026

UAE Food Import Profile and Post-Crisis Assessment



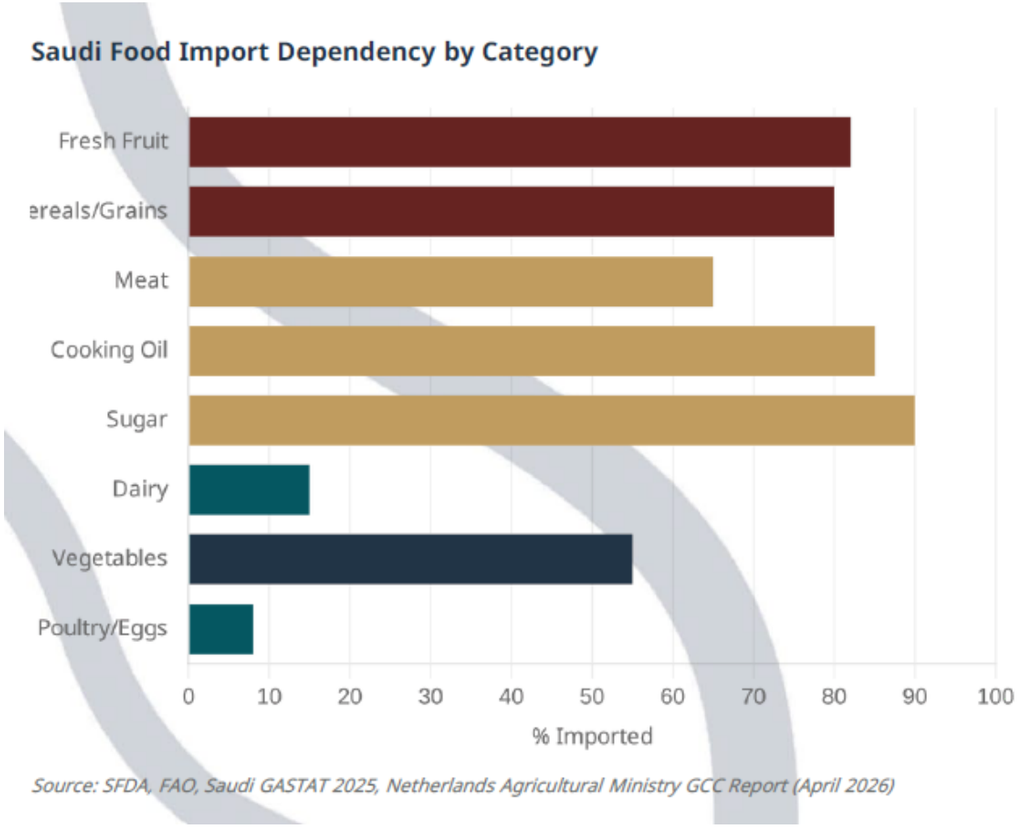
Import Dependency:

- The UAE imports 80-90% of its total food supply, driven by its arid climate, less than 1% arable land, and limited freshwater resources.
- Cereals, rice, meat, dairy, fruits and vegetables dominate its import basket, with near total import dependence for rice, sugar and cereals.
- The UAE has responded to its vulnerability with a multi-layered food security strategy, including stockpiling 3-6 months of essential commodities, diversifying import partners, investing in overseas farmland, and expanding domestic production through agri-tech and controlled environment farming.

Data Source: WetheUAE2031

Data Source: UAE Ministry of Climate Change & Environment & FAO 2026

Saudi Food Import Profile and Post-Crisis Assessment



Source: SFDA, FAO, Saudi GASTAT 2025, Netherlands Agricultural Ministry GCC Report (April 2026)

Import Dependency:

- Saudi Arabia imports ~80–85% of its total food requirements
- Dependence is highest for staple grains:
  Wheat: ~74% imported
  Barley: 100% imported
  Rice: 100% imported
  Corn/maize: ~100% imported
- Domestic production is limited due to water scarcity and climate; local wheat covers less than one-quarter of demand.
- Food imports account for ~13% of total merchandise imports
- Strategic reserves exist, e.g. ~4 months of wheat consumption, but logistics and shipping routes remain critical for food security.
- The Strait of Hormuz remains a key vulnerability, as a large share of imports traditionally transit this route.

Data Source: House of Saud, WorldBank

Further resources and information

Middle East Conflict Resources for Exporters can be found here:

- Middle East conflict: Resources for exporters – myNZTE

Shipping and Freight updates:

The following companies have updates on shipping, prices and options to help inform your decisions.

- Middle East Operational Status - Inchcape Shipping Services
- Latest News | Mainfreight New Zealand
- Hellman Worldwide Logistics - global logistics and shipping company providing near-daily updates on sea, air and road freight options.
- Maersk Operations updates on situation in the Middle East. It also publishes additional advisories.
- MSC Customer Advisories
- Kuehne+Nagel Operation Update
- CMA CGM Newsroom
- Hapag-Lloyd Customer News
- COSCO Shipping Lines - Latest News
- ONE - Operations Updates on the Situation in the Middle East
- Evergreen Line - Notices and News.
- Hormuz Live Vessel Traffic & Crude Oil Prices | ShipFinder
- Middle East Operational Update - August 5, 2026

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