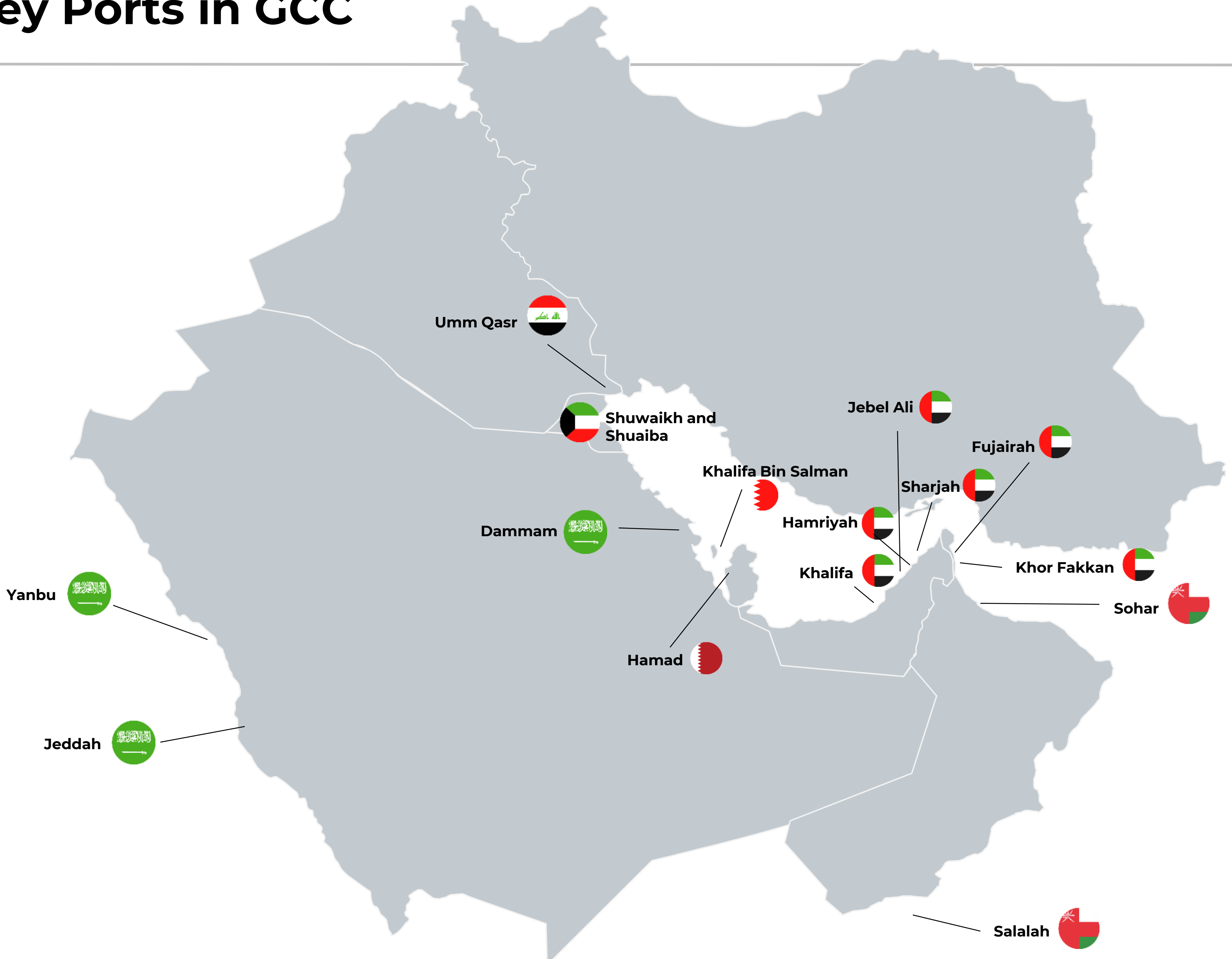
NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

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 8 MAY 2026

Map of Key Ports in GCC

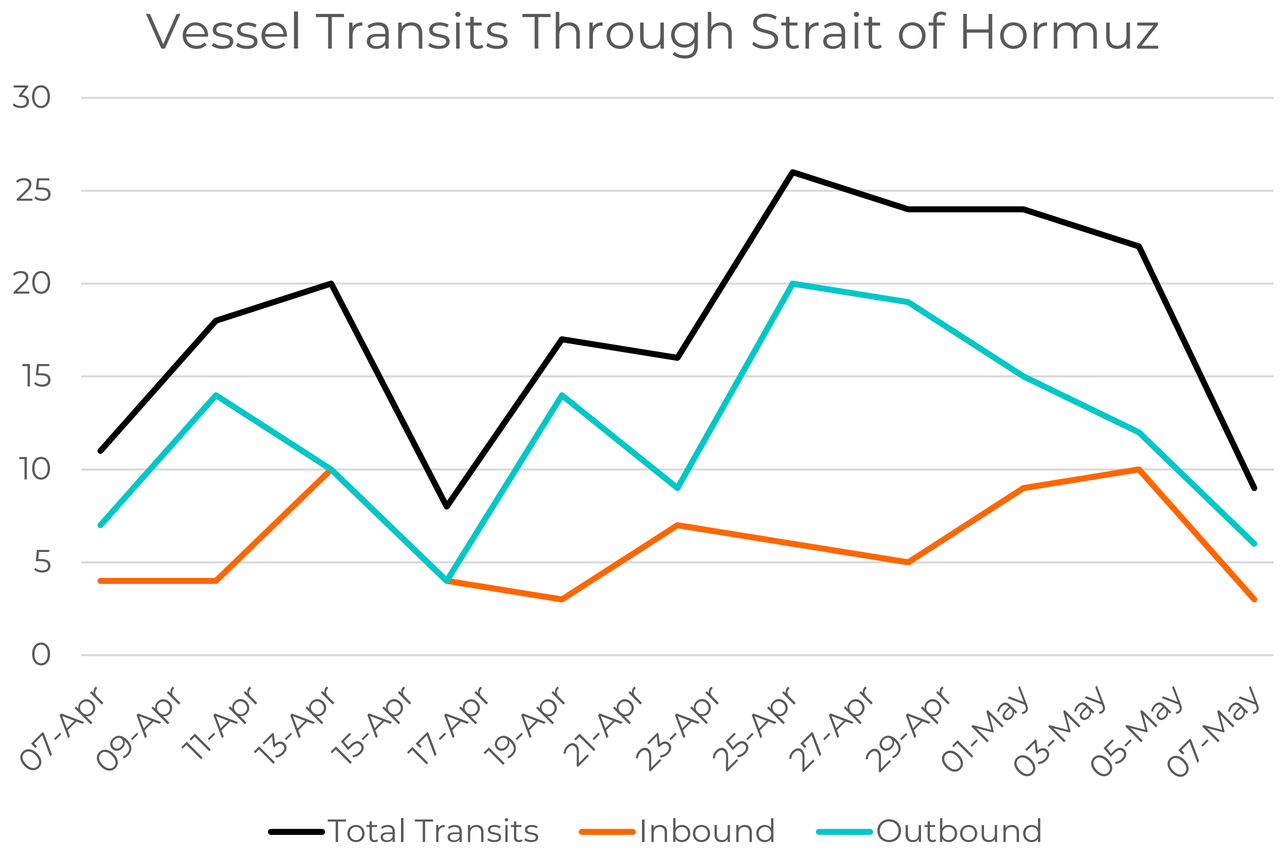


Bahrain	
Iraq	
Kuwait	
Oman	
Qatar	
Saudi Arabia	
UAE	

Strait of Hormuz Status and Sea Freight Disruption

Current Situation

- The Strait of Hormuz remains restricted and unreliable, with only limited, stop-start commercial transits despite periodic reopening announcements.
- Maritime traffic remains far below normal levels (roughly 10–15% of typical throughput), as operators continue to prioritise risk avoidance over cost or schedule recovery
- Sea freight economics have deteriorated sharply, with war risk insurance premiums around 20x normal levels and emergency surcharges applied across Gulf-linked routes.
- Most container and bulk carriers continue to reroute via the Cape of Good Hope, adding 10–14 days per voyage and propagating congestion, higher fuel costs, and schedule unreliability globally.
- Disruption is expected to persist, as fragmented reopenings have failed to restore confidence and shipping behaviour appears structurally reset rather than temporarily displaced.



*As at 8 May 2026

Data Source: Hormuz Live Vessel Traffic & Crude Oil Prices | ShipFinder

GCC Ocean Freight Operational Status

- Most major Middle East ports remain operational, including Jebel Ali, Khalifa, Hamriyah, Sharjah, Fujairah, and Khor Fakkan, with general cargo and container operations continuing as scheduled
- Fujairah Oil Tanker Terminal is mostly operational, though berthing delays of several weeks are reported due to increased diversion traffic
- Khor Fakkan Port and Container Terminal are fully operational, with all berths in use, but are experiencing extended queuing and congestion driven by re-routed vessels.
- Navigational risks persist offshore, particularly near Fujairah, where GPS spoofing and jamming incidents have been reported; the area is classified as high-risk for navigation
- STS (ship-to-ship) operations in Dubai waters have partially resumed, but are restricted, assessed case-by-case, and prohibited while vessels are underway.

PORT GROUP	STATUS	FUNCTION IN NETWORK	CONSTRAINT TYPE
UAE (Jebel Ali, Khalifa, Fujairah, Khor Fakkan)	Fully operational, with congestion at Fujairah & Khor Fakkan	Primary hub, diversion and landbridge gateway for Gulf cargo	Berthing congestion (weeks); localised GPS spoofing/jamming near Fujairah
Oman (Sohar, Salalah)	Fully operational	Transhipment buffer and contingency hub outside Hormuz	Heightened compliance and routing caution; navigation risk awareness
Saudi Arabia (Jeddah, Yanbu, Dammam)	Fully operational	Alternative Gulf & Red Sea gateway, bypassing Hormuz dependency	Minimal; manageable congestion only
Qatar	Ports open but operating below normal	Secondary Gulf gateway; reliant on selective routings	Selective terminal suspensions and reduced activity
Kuwait (Shuwaikh, Shuaiba)	Fully operational	Direct northern Gulf gateway	Elevated International Ship and Port Facility levels; crew change restrictions
Bahrain	Limited operations	Small Gulf feeder gateway	Partial operational constraints; reliance on regional feeders
Iraq	Ports operational; exports constrained	Northern Gulf export gateway	Export-specific suspension (oil terminals)

*As at 7 May 2026

Date Source: Middle East Operational Status - Inchcape Shipping Services

GCC Air Freight Operational Status

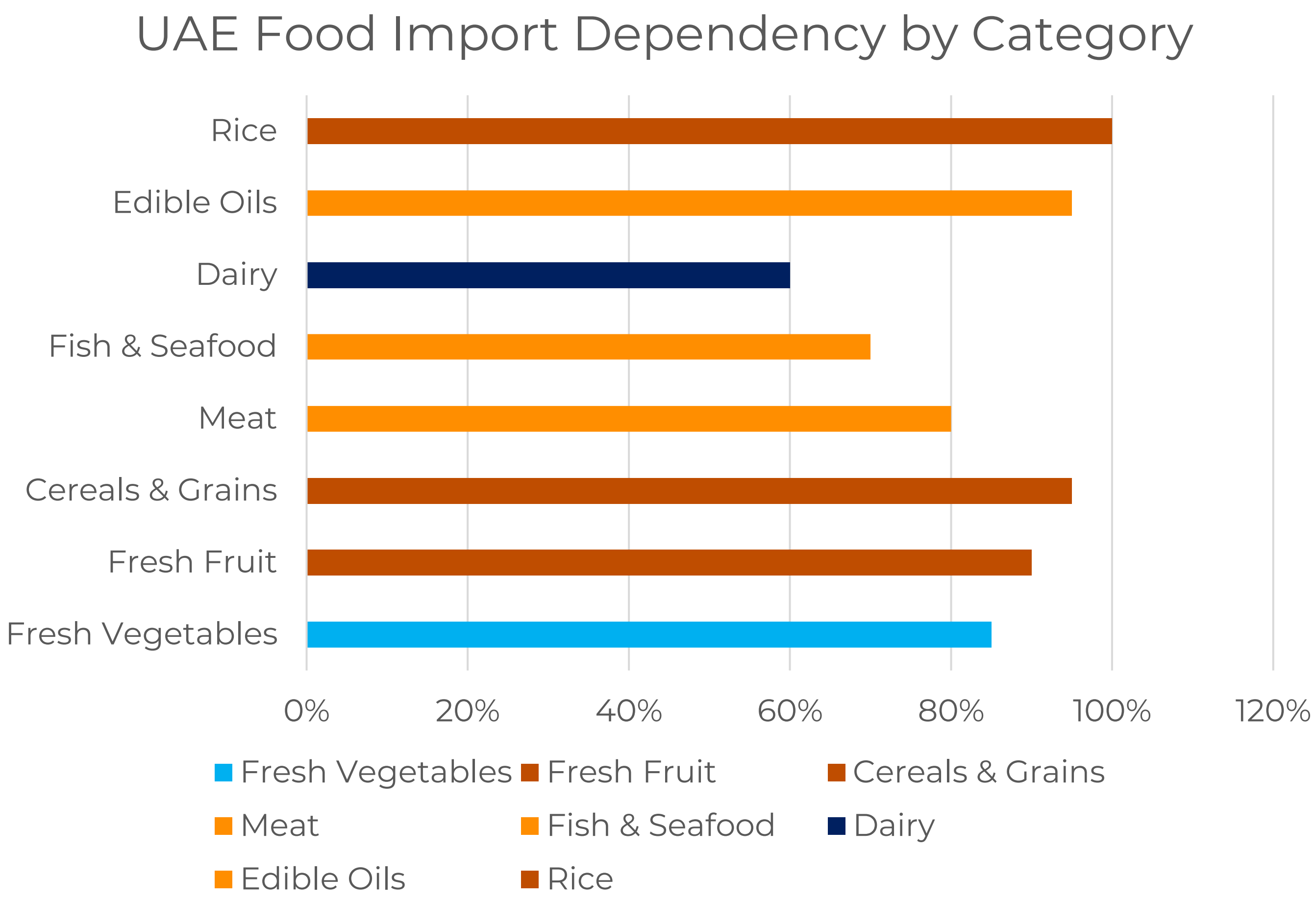
- The central Middle East air corridor remains impractical; Europe-Asia traffic continues to avoid the region, rerouting north via the Caucasus or south via Egypt/Saudi Arabia
- Qatar and Kuwait are operational under controlled, phased access arrangements, supporting limited cargo movements but without a return to normal hub-level transit or long-haul routing roles.
- Dubai, Abu Dhabi, and Sharjah had returned close to pre-disruption operations (70-90%) following a 2 May reopening but are now experiencing temporary operational halts, delays, and renewed backlogs following conflict on 4 May, especially for time-sensitive cargo
- Saudi Arabia remains fully open and the key southern bypass, supporting most rerouted traffic, though congestion and contingency measures continue to affect efficiency.

COUNTRY	AIRPORTS	AIR SPACE OPEN/CLOSED	AFFECTED AIRPORTS
Bahrain	BAH	Open	BAH
Oman	MCT	Open	
Kuwait	KWI	Limited	KWI
Qatar	DOH	Limited	DOH
Saudi Arabia	RUH	Open	RUH
Saudi Arabia	JED	Open	JED
Saudi Arabia	DMM	Limited	DMM
UAE	AUH, DXB, DWC, RAK, SHJ	Limited	All
UAE	FJR	Limited	FJR
Lebanon	BEY	Open	BEY
Iraq	EBL, BGW, BSR	Limited	All

*As at 8 May 2026

Data Source: Middle East Airspace – Current Operational Picture – International Ops 2025 – OPSGROUP

UAE Food Import Profile and Post-Crisis Assessment



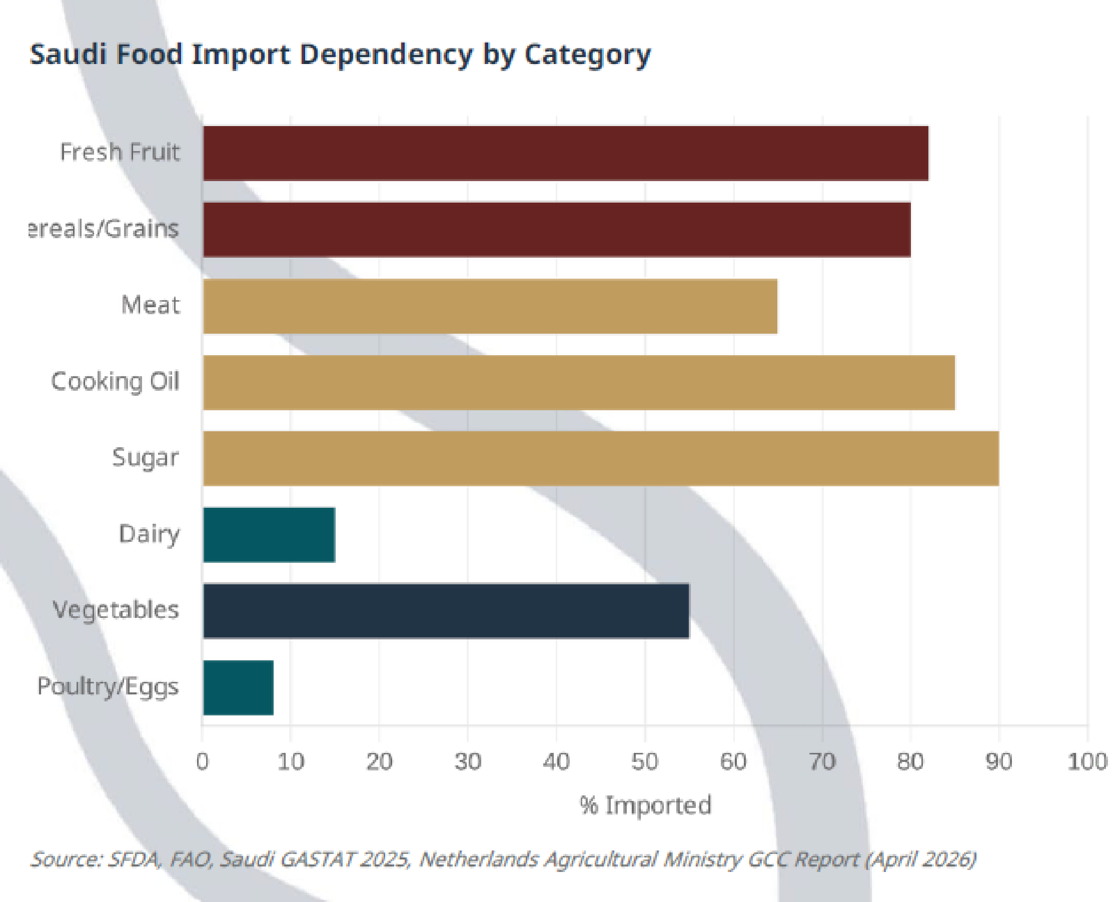
Import Dependency:

- 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



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.

- 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.

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