

# Freight Expectations

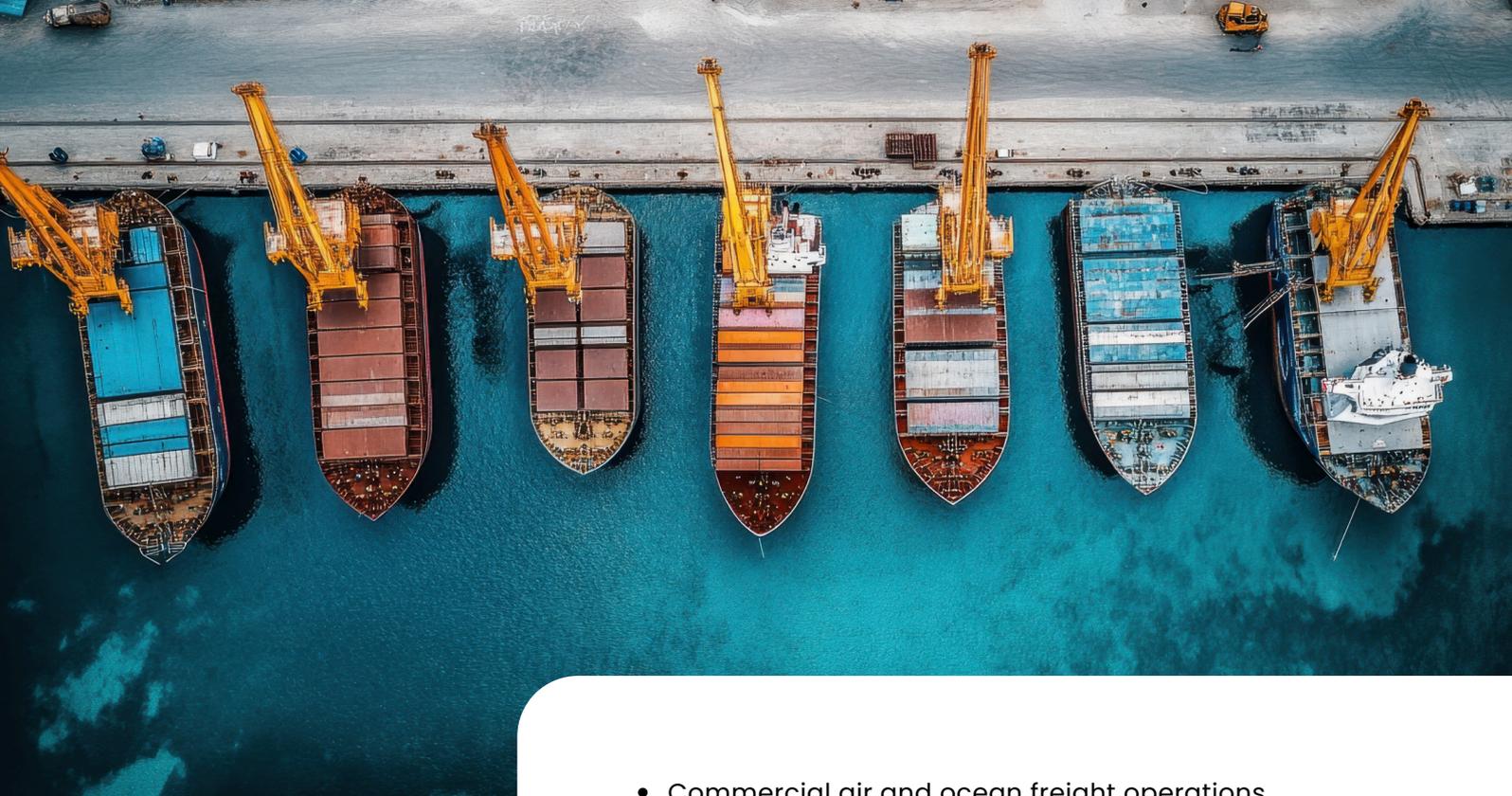


## Supply Chain & Logistics Update

Major disruption in the Middle East restricting commercial movements

Major ocean carriers have diverted vessels

Fuel surcharges are being assessed weekly due to volatile fuel pricing



# At A Glance Monthly Market Update

- Commercial air and ocean freight operations across the Middle East are facing severe disruption due to escalating security concerns.
- Fuel surcharges are being assessed weekly due to volatile fuel pricing linked to the conflict in Iran, and will apply to all rates, including previously agreed “all-in” rates.
- Commercial operations in the Gulf are facing disruption as carriers suspend bookings, reroute vessels, and apply conflict-related surcharges.
- Emergency conflict and war-risk surcharges are being applied, ranging from \$1,500 to \$4,000 per container depending on container type and route.
- Available cargo capacity on the Asia–Middle East–Europe corridor falling sharply as carriers abandon traditional Gulf stopovers. The disruptions are forcing airlines to reroute flights, increase transit times, and reconsider operational strategies.
- Join our webinar **Middle East Disruptions: Urgent Supply Chain Impacts** on Monday 9<sup>th</sup> March 2026 at 11:00 AM GMT where we break down the latest developments and share expert insights on the shipping landscape.



# From the Managing Director



The latest developments in the Gulf have delivered another significant shock to global shipping markets. Escalating security concerns, operational disruptions, and rapidly shifting risk assessments are creating real pressure across both ocean and air freight networks. Capacity constraints, rerouting decisions, and rising costs are once again testing supply chain resilience.

While the situation remains fluid, our team is closely monitoring developments in real time. We are in constant dialogue with carriers, partners, and clients to assess risk, identify alternatives, and maintain continuity wherever possible.

Importantly, it is not all challenging news. Next week, our team will be exhibiting at the London Book Fair, where we are looking forward to meeting clients, connecting with publishers, and strengthening relationships across the industry.

At the same time, colleagues will be attending the WCA Worldwide Conference in Singapore, a great opportunity to collaborate with our global partners.

We are also hopeful of bringing home the award for Best European Partner for the fourth consecutive year, which would be a tremendous achievement for our team.

As always, our priority is simple: to provide clarity, steady leadership, and dependable solutions for every client.



*Thomas Kuehn*

MANAGING DIRECTOR



# Middle East Shipping Disruption

**Commercial air and ocean freight operations across the Middle East are facing severe disruption due to escalating security concerns**

- Multiple airlines have suspended both passenger and freighter services across significant parts of the region.
- The United States has declared a maritime warning zone covering the Persian Gulf, Gulf of Oman, North Arabian Sea, and the Strait of Hormuz, effectively restricting commercial vessel movements.
- Major ocean carriers have diverted vessels or instructed ships within the Gulf to seek shelter.
- Fuel surcharges are being assessed weekly due to volatile fuel pricing linked to the conflict in Iran, and will apply to all rates, including previously agreed “all-in” rates.

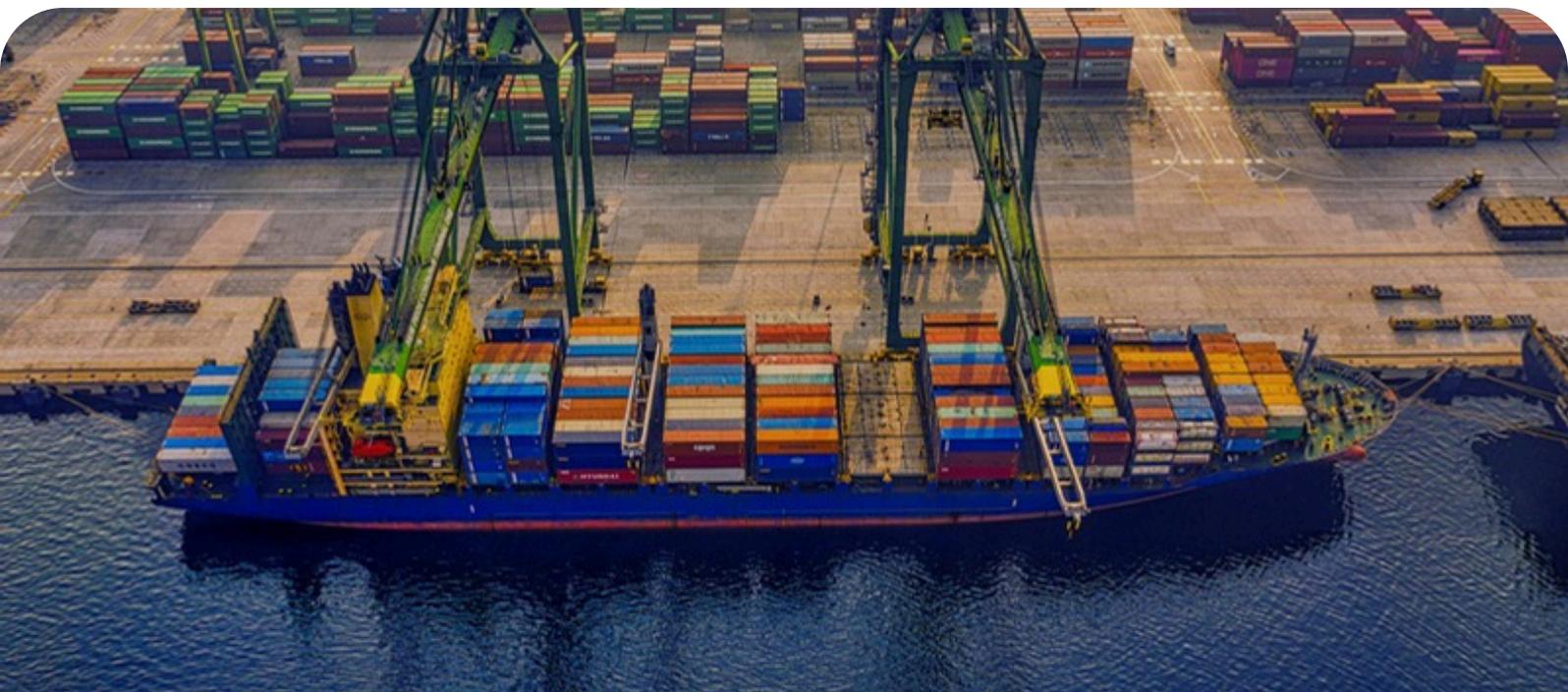
Following a tanker strike off Oman and reported damage at Jebel Ali, risk perception across Gulf routings has shifted sharply.

**What we're seeing:**

- War risk premiums starting to rise
- Insurers tightening underwriting posture
- Hapag-Lloyd suspending transits via the Strait
- Vessels pausing, waiting, or reassessing Gulf port calls

**Bottom line: Gulf routings are becoming commercially harder to operate.**

- Lead times and reliability become less predictable
- Supply chain diversification — such as alternate sourcing and stock buffers — becomes even more critical
- Disruptions or even temporary shutdowns of this corridor would impact the flow of electronics, machinery and finished goods, amplifying delays and pushing up freight costs.
- Supply chain interruptions here would cascade into manufacturing sectors worldwide.



# Gulf Cargo Operations Hit by Suspended Bookings and Vessel Rerouting

*The Middle East shipping landscape is under pressure as carriers reassess the safety and commercial viability of Gulf operations.*



Commercial operations in the Gulf are facing disruption as carriers suspend bookings, reroute vessels, and apply conflict-related surcharges. Shippers should expect delays, congestion, and rising costs, emphasizing the need for careful route planning and risk monitoring.

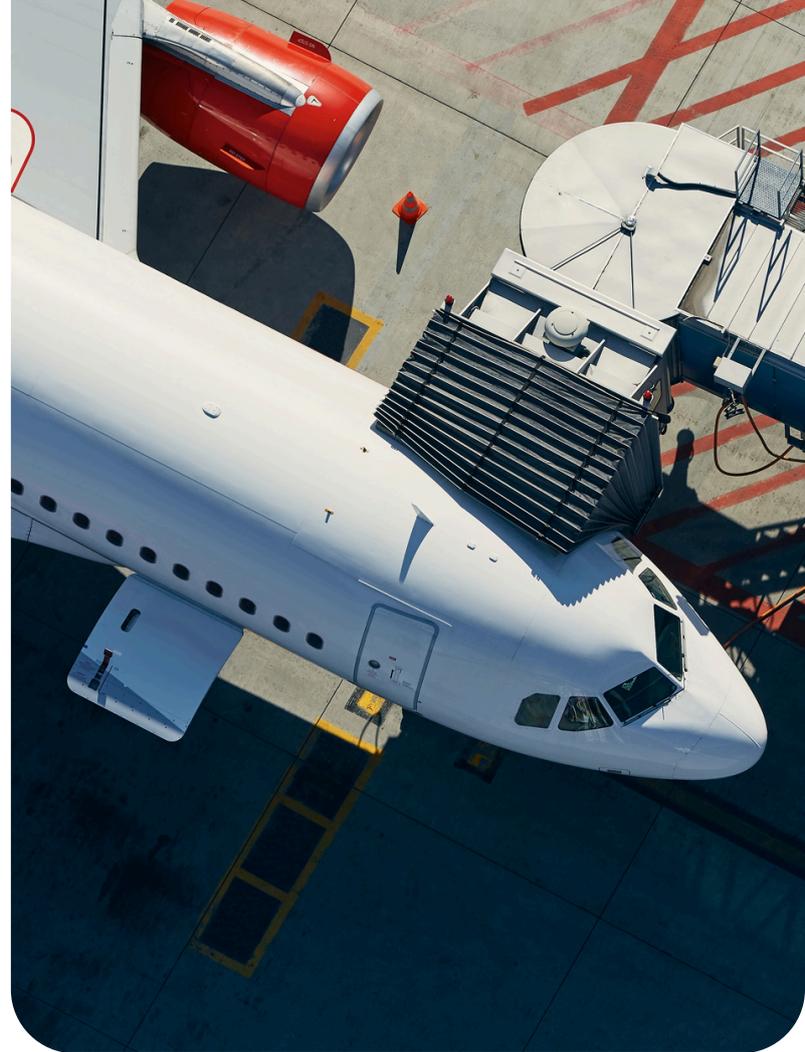
## **Key information:**

- Multiple major ocean carriers—including CMA CGM, Cosco, HMM, MSC, ONE, OOCL, PIL, and Wan Hai—have suspended cargo bookings for Middle East routes, particularly those transiting the Strait of Hormuz.
- Evergreen has made adjustments to vessels already in transit, while Maersk and CMA CGM are rerouting ships away from traditional Gulf passages, opting for alternative routes around Africa.
- Emergency conflict and war-risk surcharges are being applied, ranging from \$1,500 to \$4,000 per container depending on container type and route.
- Cargo is increasingly being discharged at alternative ports such as Salalah, Khor Fakkan, Sohar, Duqm, and Colombo, creating congestion and delays in onward shipments.
- Insurers are tightening underwriting, and carriers are operating with heightened caution, reflecting a sharp increase in perceived risk in the region.

## AIR FREIGHT

# Airlines Reroute Flights as Gulf Closures Disrupt

*With airspace in Qatar, the UAE, Kuwait, Bahrain, Iraq, Iran, and Israel closed, airlines have rapidly reconfigured operations.*



Air cargo operations between Asia and Europe are facing unprecedented disruption following widespread Middle East airspace closures. The impact has been immediate and severe, with available cargo capacity on the Asia–Middle East–Europe corridor falling sharply as carriers abandon traditional Gulf stopovers. The disruptions are forcing airlines to reroute flights, increase transit times, and reconsider operational strategies.

### **Key Points:**

- Available cargo tonne-kilometres (ACTK) on Asia–Middle East–Europe routes fell by approximately 26% over a single weekend.
- Airspace closures affect Qatar, UAE, Kuwait, Bahrain, Iraq, Iran, and Israel, prompting carriers to fly direct long-haul sectors or divert via Central Asia.
- Direct Asia–Europe capacity has risen 13–14% as airlines avoid Gulf hubs like Doha, Dubai, and Abu Dhabi.
- Gulf stopover capacity has plunged by as much as 75%, highlighting the region’s centrality to global air cargo flows.
- India and South Asia have experienced capacity drops exceeding 60%, emphasising their reliance on Gulf links.
- Forwarders are limiting bookings and advising shippers to hold cargo at origin as the network adjusts.
- Overall global air cargo lift has declined by up to 18% week-on-week, with 13% of international widebody and freighter capacity now at risk.

Airlines are rerouting flights, capacity is constrained, and the disruption is creating potential backlogs and upward pressure on freight rates. Shippers should closely monitor developments and consider alternative routing and contingency plans to maintain supply chain continuity.

# Asia–Europe Capacity Plummets: Middle East Airspace Closures

**Air cargo capacity across the vital Asia–Europe trade corridor has collapsed as widespread Middle East airspace closures send shockwaves through global freight networks.**

## Extensive airspace closures decreased capacity on Asia-Middle East-Europe corridor by 26%

Change in international air cargo capacity, weekend of 21/22 of Feb vs. 28 Feb/1March<sup>1</sup>  
WoW change in ACTK capacity (%), freighters and widebody passenger



Overall capacity change (ACTK %):

**-26%**

(includes Asia-Middle East-Europe, excludes intra-Asia and Africa-Europe)

**A** Notes: 1) Growth is based on available cargo tonnage (ACTKs) on first 35 hours of the weekend 21/22 of February versus first 35 hours of the weekend 28 of February / 1<sup>st</sup> of March. Flights touching North America and Latin America excluded from growth figure. Includes narrowbody/medumbody/widebody freighters and passenger widebodies. Source: Aevean capacity data; Aevean analysis (2 March 2026)

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New data from aviation consultancy Aevean shows that available cargo tonne-kilometres (ACTK) on the Asia–Middle East–Europe route fell by around 26% over a single weekend compared with the prior week as carriers were forced to abandon traditional Gulf stopovers in the face of escalating regional risk.

MUST WATCH WEBINAR

# Middle East Disruptions: Urgent Supply Chain Impacts

The Middle East is sending shockwaves through global shipping—and your supply chain could be next. Ocean routes are rerouting, air freight schedules are shifting, carriers are updating surcharges, and delays are mounting.

Join our Procurement Manager, Cesar Caicedo, and Air Freight Heathrow Branch Manager, Mick Patterson, for a live session where they'll break down the latest developments and share expert insights on the shipping landscape.

Whether you ship by sea or air, this webinar equips you to act fast, plan smarter, and stay ahead of the curve.

[Click here to register](#)

[Don't miss it—register early to secure your spot.](#)

## What you will take away from this free webinar?

- Understand how Middle East disruptions are reshaping ocean and air freight routes, and what carriers are doing in response.
- Get clarity on new fees, surcharges, and pricing shifts so you can plan budgets and avoid unexpected costs.
- Learn practical steps from our Procurement Manager and Head of Air Freight Operations to minimize delays and keep your shipments moving.

**Monday 9<sup>th</sup>  
March 2026**



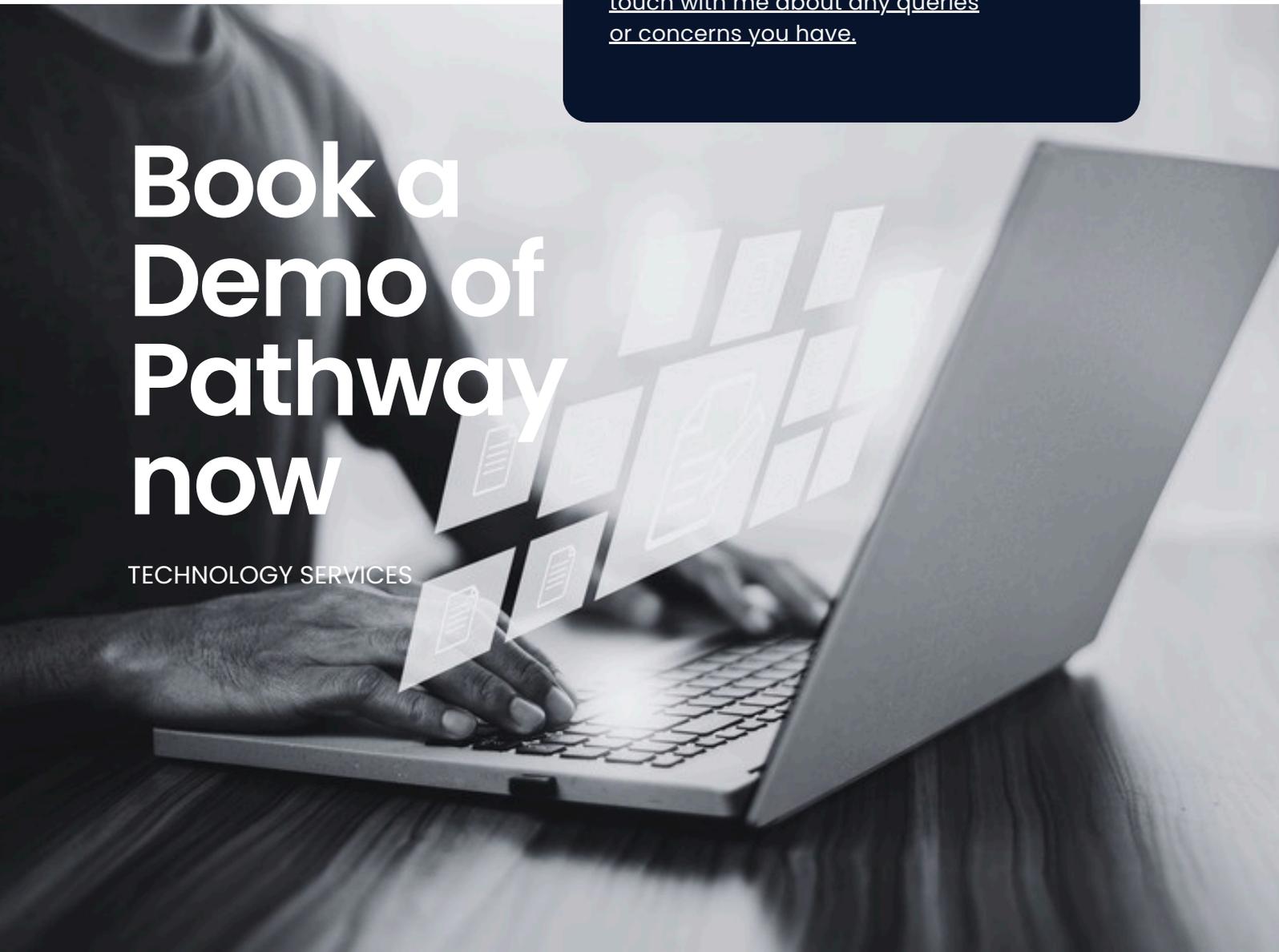
# Take Control of Your Supply Chain Today

No two logistics challenges are the same. I understand this and I'm here to tailor solutions to meet your specific needs. I can work closely with you to develop strategies that address your unique challenges effectively and efficiently, offering guidance that allows you to plan and adjust logistics strategies accordingly.



**Want to get in touch.**

[Click here if you want to get in touch with me about any queries or concerns you have.](#)

A grayscale photograph of a person's hands typing on a laptop keyboard. The laptop screen is open, and several translucent, glowing rectangular panels with data charts and icons are floating in the air above the keyboard, suggesting a digital or data-driven environment.

# Book a Demo of Pathway now

TECHNOLOGY SERVICES