From Sea Lanes to Land Bridges: How Global Shipping Lines Are Rewiring Gulf Logistics After Hormuz (Part I)

The end of a maritime certainty

The decades-old assumption that the Strait of Hormuz will always be functionally open is over. The global shipping system has been built on this assumption, but the 2026 Iran war has shattered it. At present, shipping is watching the news and ongoing developments with anticipation. What initially appeared as a temporary disruption has, however, now forced a structural redesign of logistics flows linking Europe, Asia, and the Gulf.

The response of the world's leading container carriers, Maersk, CMA CGM, Hapag-Lloyd, and MSC, has demonstrated a strategic shift beyond rerouting vessels, actively constructing a parallel logistics architecture that bypasses Hormuz both at sea and on land, highlighting their proactive adaptation.

A new reality is being built, with Gulf ports transitioning from guaranteed maritime endpoints to inland markets connected through a web of alternative seaborne gateways and overland corridors, marking a shift from maritime-centric logistics to a flexible, hybrid, multimodal system defined by geopolitical risk management.

The rise of corridor-based logistics

A striking convergence across all major carriers is evident, centered on a set of alternative corridors. This new network of alternative routes is currently the backbone of a system that connects Gulf markets to global trade without relying on direct transit through the Strait.

The Red Sea corridor is clearly the first, and maybe the most important one. This corridor is anchored by Jeddah and King Abdullah Port in Saudi Arabia and Aqaba in Jordan. For cargoes destined for Saudi Arabia, Bahrain, Qatar, Kuwait, and Iraq, these ports have become the critical western gateways. From these ports, goods are transported inland via trucking or rail, effectively replacing maritime access through Hormuz.

Oman and the Gulf of Oman hold the second corridor, centered around the ports such as Sohar, Salalah, Khor Fakkan, and Fujairah. Again, all the ports are outside or at the edge of the Strait and have now gained outsized importance as alternative maritime entry points. Most of the cargoes here can be moved inland to Gulf destinations that would otherwise be inaccessible or too risky to serve directly.

Not surprisingly, but somehow forgotten by some, there is also a northern corridor, directly linked to Iraq, which connects to Mediterranean ports such as Mersin in Turkey and to Aqaba. Iraq is now facing a bifurcated logistics system, with the northern and southern regions connected to different maritime gateways.

Finally, and mainly caused by the logistics of the now-constrained Arab Gulf and Red Sea hubs, Indian ports such as Mundra and Nhava Sheva have emerged as overflow hubs. These Indian ports are currently primarily used to absorb displaced cargo and serve as buffers within the system. This development should not be seen as a substitute for Gulf access, but rather as a means of providing critical flexibility in managing congestion and redistributing flows.

Together, these corridors form a resilient, distributed network, reassuring stakeholders of enhanced system stability despite increased complexity.

Maersk and the architecture of the land bridge

Among major carriers, Maersk has articulated a comprehensive landbridge strategy, systematically rerouting cargo through alternative gateway ports combined with inland transport, ensuring connectivity with Gulf markets despite disruptions.

The company's approach centers around the systematic use of alternative gateway ports combined with inland transport. It is rerouting cargo originating in Upper Gulf markets such as Bahrain, Kuwait, Qatar, and eastern Saudi Arabia, through Jeddah. At that port, it transfers all onto trucks or rail for onward delivery. When addressing Iraqi cargoes, the latter is redirected through Aqaba, using the Red Sea outlet option that bypasses the Strait entirely.

Maersk also leverages Oman-based ports such as Sohar and Salalah, as well as Khor Fakkan and Fujairah in the UAE. The company has created eastern entry points into the Gulf region in this way, where the ports function as staging areas from which cargo can be distributed inland to final destinations.

The Maersk strategy is clearly coherent, as it does not treat each disruption as an isolated problem but counters them all with a new network architecture. In the Maersk system, maritime routes, inland logistics, and port operations are integrated into a single framework. This can adapt dynamically to geopolitical risk.

This all reflects a broader transformation of the company itself, in which Maersk is no longer merely a shipping line but an integrated logistics provider. By doing so, it can orchestrate complex, multimodal supply chains under extreme uncertainty.

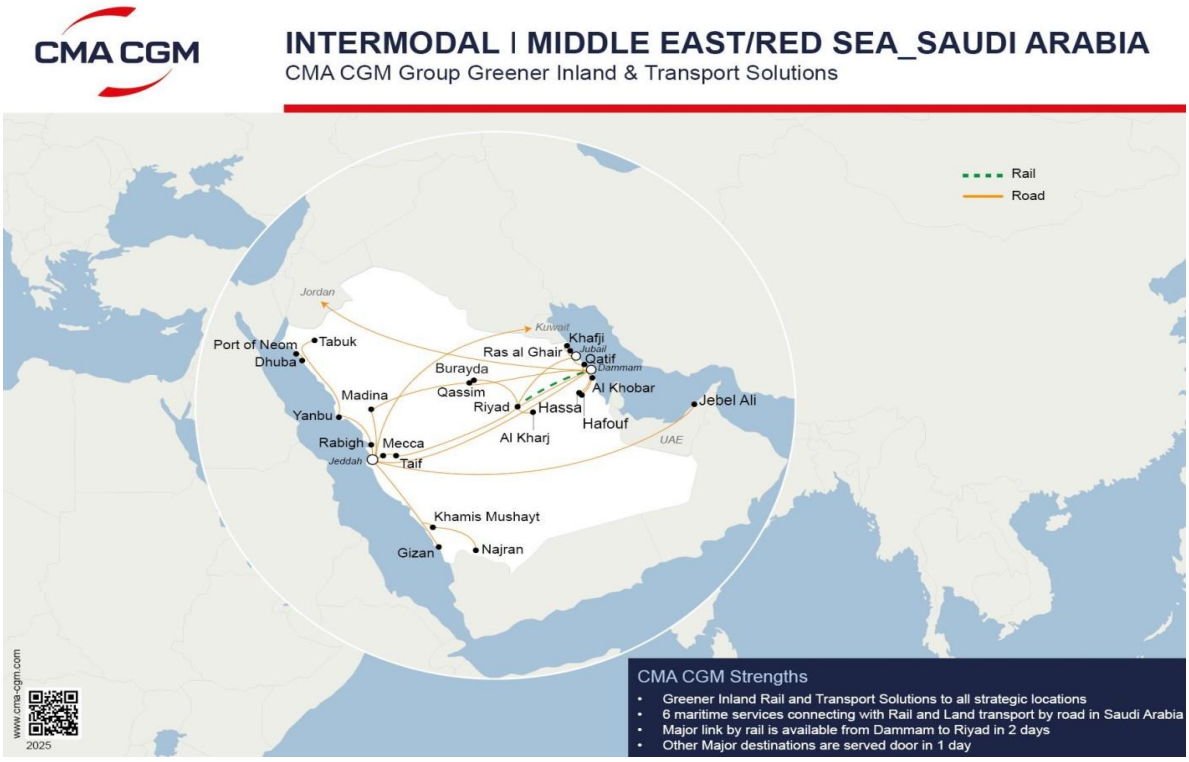
CMA CGM and the logic of redundancy

While Maersk has architectural coherence, CMA CGM fully focuses on redundancy. As can be seen from its published materials, which also include corridor maps, the company has made a deliberate effort to build multiple overlapping routes serving the same markets.

CMA CGM's Jeddah corridor mirrors Maersk's Red Sea strategy, providing access to Gulf markets via inland transport. CMA CGM's Aqaba corridor is serving southern Iraq, while it connects northern Iraq to the Mediterranean via the Mersin corridor. As with others, CMA CGM also has alternative routes via Sohar, Khor Fakkan, and Fujairah.

What is particularly notable is CMA CGM's emphasis on contingency ports. Even on its sites, the company publishes lists that include not only Middle Eastern alternatives but also Indian ports such as Mundra and Nhava Sheva. It also includes hubs in East Africa and Asia. The latter approach falls within a broader strategy of geographic diversification, reducing dependence on any single region or route.

CMA CGM's main message or underlying logic is clear: in a world of persistent geopolitical risk, resilience is achieved not through optimization but through redundancy. The overall network is designed to absorb shocks by shifting flows across multiple corridors, even if this comes at the cost of efficiency.



Source: www.cma-cgm.com

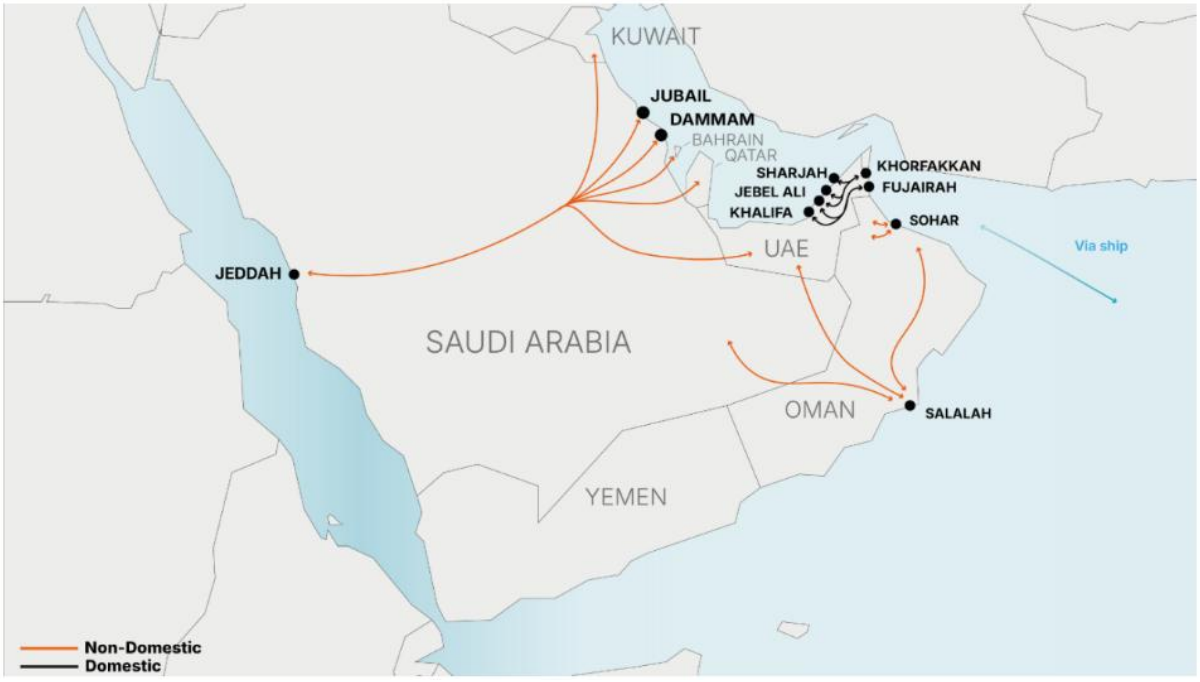
Hapag-Lloyd and the rise of carrier haulage

Most remarkable are the developments by Hapag-Lloyd. The company has initially been perceived as less explicit in its response. Still, based on its carrier-haulage update, it is clear that it has developed a robust inland logistics capability.

Hapag-Lloyd explicitly offers cross-border container movements via Jeddah, Salalah, Sohar, Khor Fakkan, and Fujairah, serving markets including Saudi Arabia, Bahrain, Kuwait, Qatar, the UAE, and Oman. The latter is crucial, as it emphasizes the availability of trucking networks in Saudi Arabia and the UAE, underscoring the important role of inland transport in maintaining connectivity.

This move is a significant shift for the carrier, as traditionally, shipping lines have focused on ocean transport, leaving inland logistics to third parties. In the current Hormuz and post-Hormuz reality, control over inland corridors has been and will be a critical competitive advantage. By managing carrier haulage, Hapag-Lloyd can now offer end-to-end solutions that bypass disrupted maritime routes.

Still, there are some issues to be addressed, as the company's communications underscore the system's constraints. Capacity is limited, availability is uncertain, and services are subject to operational conditions. The latter statements reflect the reality that inland logistics, unlike ocean shipping, cannot be scaled rapidly. As a result, the new system is inherently more constrained and selective.



Source: https://www.hapag-lloyd.com/en/services-information/news/2026/03/here-s-an-update-about-carrier-haulage-solutions-in-the-middle-e.html

MSC and the power of scale

Compared with its peers, MSC remains less transparent in its public communications, but its current actions suggest a strategy based on scale and flexibility.

By leveraging its vast fleet it is set to redeploy capacity across alternative routes, including India, East Africa, and the Mediterranean. MSC has also reported implementing war-risk surcharges and adjusting pricing dynamically in response to changing conditions.

Even though MSC didn't publish any detailed corridor maps, the company's operational behavior indicates it is participating in the broader shift toward multimodal logistics. The company's scale seems to allow it to absorb shocks and reposition assets quickly, even in the absence of a clearly articulated public framework.

From Gulf ports to inland markets

The Hormuz crisis has profound consequences for the region, as it has redefined Gulf markets themselves. Countries such as Iraq, Qatar, and Bahrain are no longer served primarily through direct maritime access. Still, they are and will be integrated into a network of inland corridors linked to alternative seaborne gateways.

While most attention is focused on Saudi Arabia, Qatar, and the UAE, Hormuz has resulted in a bifurcated system for Iraq. The country's southern regions are connected through Aqaba, while northern areas are linked to Mersin. The region's smallest (in size) countries, Qatar and Bahrain, are now looking at an access which is maintained through a combination of Red Sea and Oman-based ports, with cargo transported inland to final destinations.

This regional logistic transformation has significant implications again. The new setup is not only reducing the overall dependence on a single chokepoint but also increasing complexity and cost. For now and in the future, it will also require new infrastructure, new regulatory frameworks, and new forms of coordination between maritime and inland transport.

The limits of resilience

While optimism is sky-high, as a doomsday scenario has been averted, the new system is far from perfect. As the Arab Gulf (or GCC) is definitely not yet an EU, all these inland corridors are capacity-constrained, particularly for trucking and border processing. When looking at overall trade, it is clear that costs will be significantly higher, as they reflect additional handling, longer routes, and increased risk. At the same time, the new system will need to address longer, less predictable transit times, which undermine the efficiency of global supply chains.

At the same time, the system is still inherently selective. High-value and time-sensitive cargo will justify the additional cost and complexity, but lower-margin goods may be priced out. Global trade could be facing a new layer of inequality, based on access to resilient logistics that varies with economic value.

A new doctrine of logistics

Based on this temporary analysis, there is a new doctrine of logistics, one that departs fundamentally from the principles of the pre-crisis era. While, before Hormuz, the primary objective was efficiency, the focus has now shifted to resilience, flexibility, and security.

Additionally, global shipping lines should no longer be considered to be simply transport providers. Based on the current situation and possible future, shipping lines have become architects of complex, multimodal networks that span sea, land, and increasingly air. It seems very rational to state that they will not only be managing vessels, but entire corridors of trade.

In this context, the Hormuz crisis is not an anomaly, but the clear harbinger of a new normal in which geopolitical risk is a constant feature of the operating environment. Having, or even expanding, the ability to navigate this risk, reroute flows, reconfigure networks, and maintain connectivity under pressure will define the competitive landscape of the shipping industry in the years ahead.

Conclusion: the age of corridor power

Global shipping is undergoing a profound transformation. Looking at the moves being made by Maersk, CMA CGM, Hapag-Lloyd, and MSC, the industry is now moving toward a new model in which control over logistics corridors is the key determinant of success.

Hormuz is not a single point of failure, but a node within a broader system of routes and connections. Shipping lines are now facing the challenge not only of avoiding disruption but also of designing networks that can function despite it.

As stated before, the era of frictionless globalization is over and will not return. Reality now is a world of controlled connectivity, where trade flows are shaped as much by geopolitics as by economics. Winners will be those who can turn disruption into opportunity, which, at present, means transforming chokepoints into corridors.

The geopolitics of corridors: from infrastructure to leverage

The above is clearly shaping the future of shipping. At the same time, something else is emerging from Hormuz. The disruption is not only causing a logistical reconfiguration but also, as seen by Iran's Hormuz strategy, a **redistribution of geopolitical leverage**. What we are witnessing is a reality in which control over corridors rapidly becomes as important as control over production or consumption. Ports, roads, railways, and customs regimes are no longer neutral infrastructure; boards, investors, and policymakers should regard them as strategic assets embedded in geopolitical competition.

Saudi Arabia, for example, finds itself in a uniquely advantageous position, even if it may not look like this at present. The Kingdom's Red Sea ports, Jeddah and King Abdullah, but also others such as Oxagon, have and will become indispensable gateways for Gulf trade. Riyadh's long-discussed "land bridge" between the Red Sea and the Gulf has now become an operational necessity rather than a future vision. Every container that moves from Jeddah to Dammam or Riyadh reinforces the Kingdom's role as a **logistics pivot between East and West**.

Oman is also witnessing an increased strategic relevance, as its ports, especially Sohar, Duqm, and Salalah, which were once positioned as complementary to Gulf hubs, now function as **primary alternatives**. The structural advantage of these ports is that they are outside of Hormuz. This advantage is unlikely to disappear even if the strait is reopened. Some could even now state that Oman has become a **geopolitical hedge** within the Gulf system.

The Turkish port of Mersin has also seen an increased importance as a northern gateway for Iraq. These developments and Mersin's positioning fully align with Ankara's broader ambitions to position itself as a Eurasian logistics hub linking Europe, the Middle East, and Asia. Remarkably, for some, Jordan's Aqaba port, which has not been regarded as a regional hub for years, is now a critical node for southern Iraq. The latter shows clearly that secondary ports can gain strategic significance under conditions of disruption.

These shifts point to a broader transformation: the fragmentation of global trade into **competing corridor systems**, each shaped by geography, politics, and security dynamics. The Iran-Hormuz crisis is now an accelerator of a transition toward a more regionalized and politically mediated form of globalization.

Ports under pressure: winners and losers

The current reconfiguration of logistics flows is also reshaping the hierarchy of ports across the Middle East and beyond. At present, it is already clear that some ports are emerging as clear winners, while others could face structural decline.

Saudi Arabia's Jeddah and King Abdullah Port have seen a surge in activity, mainly because carriers redirect cargo through the Red Sea. They will be part of, or central to, a new system due to their ability to handle large volumes and connect to inland transport networks. However, this rapid increase in throughput will create challenges, including congestion, capacity constraints, and the need for accelerated infrastructure investment.

Oman's Sohar and Salalah have clearly benefited from their strategic location outside the Strait of Hormuz. Both ports are increasingly serving as transshipment hubs and entry points for cargo destined for the Gulf. Again, their future and growth will depend on the ability to scale inland connectivity and maintain operational efficiency under pressure.

The UAE's Fujairah and Khor Fakkan, which have already been prominent as bunkering and transshipment hubs, have again gained additional significance as eastern gateways. Their proximity to the Strait allows them to capture traffic that cannot safely proceed further into the Gulf, while still providing access to inland markets.

The above, however, is contrasted with the situation and future of ports located deep within the Gulf, such as Bahrain, Qatar, and eastern Saudi Arabia. Given the ongoing crisis and current realities, they will face a more uncertain future. While they remain critical for domestic distribution, their role in global shipping networks is being diminished. Without any doubt, the result is that they are being **de-maritimized**, becoming dependent on inland connections rather than direct ocean access.

Beyond the region, Indian ports such as Mundra and Nhava Sheva are experiencing increased demand as overflow hubs. This reinforces India's position as a key node in global logistics, bridging the gap between disrupted Middle Eastern routes and broader trade networks.

The economics of disruption: cost, capacity, and competition

Even though the future is still unclear, one issue is clear. The shift to corridor-based logistics will come at a high economic cost. Each additional leg of transport, whether by truck, rail, or feeder vessel, will add complexity and expense for the parties involved, especially for shipping and ports. Handling costs increase, transit times lengthen, and the risk of delays multiplies.

At present, shipping lines have already responded by introducing a range of surcharges, including war-risk premiums and emergency bunker adjustments. These costs are being passed on to customers, contributing to higher freight rates and increased volatility in global trade.

The major focus will need to be on the effective capacity of the global shipping system, which is being reduced. Longer routes, congestion at alternative ports, and bottlenecks in inland transport all limit the number of containers that can be moved within a given timeframe.

The current situation has created a structurally tighter market, in which supply struggles to keep pace with demand.

Competition among carriers is also evolving. Traditional metrics such as fleet size and vessel efficiency are being supplemented by new factors, including the ability to manage inland logistics, secure access to alternative ports, and navigate complex regulatory environments. In this context, integrated logistics capabilities, such as those developed by Maersk and CMA CGM, become a key source of competitive advantage.

Energy, fuel, and the logistics nexus

The Hormuz crisis also holds a major, still underappreciated aspect: fuel logistics. Since the end of February 2026, the Strait has changed. However, it is not only a conduit for cargo but also a critical artery for the movement of oil and LNG, which underpin the global bunkering system. Due to the Hormuz closure and ongoing developments, access to Gulf fuel supplies has become constrained, forcing shipping lines to source fuel from alternative locations, including Europe, the Americas, and Asia. This increases costs and introduces additional uncertainty into voyage planning.

UAE's Fujairah, which is one of the global bunkering hubs, plays and will play a pivotal role in this context. Its location outside the Strait allows it to continue serving vessels, but its capacity is not unlimited. Any disruption to Fujairah would have cascading effects across the global shipping system.

The interplay between energy and logistics is becoming increasingly evident. For shipping or any maritime operators, fuel availability is no longer a background consideration. It has become a strategic variable that can shape routing decisions and influence the viability of entire corridors.

Investment implications: infrastructure, finance, and strategy

The emergence of corridor-based logistics creates both risks and opportunities for investors. Existing assets in the Gulf could be facing declining utilization and increased uncertainty. At the same time, new infrastructure projects, particularly those focused on inland connectivity, are expected to see increased demand.

Key areas of investment include:

- Road and rail links connecting Red Sea and Oman ports to Gulf markets
- Expansion of capacity at alternative ports such as Jeddah, Sohar, and Salalah
- Development of logistics hubs and distribution centers along key corridors
- Digital infrastructure to manage complex, multimodal supply chains

Financial institutions and sovereign wealth funds are already adapting their strategies to reflect these shifts. Investments are being redirected toward assets that enhance resilience and flexibility. It is not only those optimized for efficiency under stable conditions.

For shipping lines, the challenge is to balance short-term operational needs with long-term strategic positioning. This may involve partnerships with governments, investments in inland logistics capabilities, and participation in infrastructure development projects.

The future of global shipping: scenarios and trajectories

Looking ahead, several scenarios can be envisaged.

The first scenario entails the Strait of Hormuz gradually reopening, but the risk remains elevated. In this case, the new corridor system persists alongside traditional routes, creating a hybrid model in which shipping lines maintain multiple options and switch between them as conditions change.

The second scenario will see a Strait that remains intermittently disrupted, leading to a permanent shift toward alternative corridors. This would accelerate investment in inland infrastructure and further entrench the role of Red Sea and Oman-based ports.

The third, or doomsday scenario, entails the crisis escalating, affecting additional chokepoints such as the Bab El-Mandeb and the Suez Canal. This would trigger a more profound restructuring of global trade, potentially involving a greater reliance on long-distance routes such as the Cape of Good Hope.

In all scenarios, one trend is clear: the increasing importance of resilience as a guiding principle of logistics strategy. The ability to adapt to disruption, rather than to optimize for stability, will define the future of the industry.

Final reflection: from flows to systems

The transformation triggered by the Hormuz crisis not only hits shipping but goes beyond it. It represents a shift in how global trade is organized and understood.

In the past, logistics was often treated as a background function, enabling the smooth flow of goods across borders. Today, it is at the forefront of geopolitical and economic strategy. Shipping lines are no longer simply moving containers; they now design and manage complex systems that integrate sea, land, and air.

This shift has profound implications. It challenges existing business models, reshapes investment priorities, and alters the balance of power between states and corporations. It also raises fundamental questions about the future of globalization.

What is emerging is not a retreat from global trade, but a reconfiguration. Connectivity remains, but it is no longer frictionless. It is mediated by corridors, shaped by politics, and constrained by risk.

In this new world, the Strait of Hormuz is no longer just a chokepoint. It is a catalyst, a trigger for a broader transformation in how goods move, how networks are designed, and how power is exercised across the global economy.