

MIDDLE EAST CONFLICT

Impacts on Air Cargo and Containerised Trade

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The rapidly escalating conflict in the Middle East following major military action over the weekend has already resulted in severe disruption to global aviation and air cargo networks, alongside significant impacts on containerised shipping, with flow on consequences for global supply chains.

AVIATION & AIR CARGO

Severe and Ongoing Disruption

The Middle East is a critical global aviation hub connecting Asia, Europe, Africa and Oceania. Widespread airspace closures and airport disruptions are now having global ripple effects, including on air cargo capacity and schedule reliability.

Current Situation

- Airspace over **Iran, Iraq, Kuwait, Israel, Bahrain, the United Arab Emirates and Qatar** has been closed or heavily restricted.
- Major regional hub airports, including **Dubai, Abu Dhabi and Doha**, have been shut.
- Thousands of passenger and cargo flights have been cancelled or rerouted, with aircraft and crews displaced globally, complicating recovery once airspace reopens.

Airline Updates

Emirates (Dubai)

- Emirates has **temporarily suspended all operations to and from Dubai** due to multiple regional airspace closures.
- Dubai International Airport sustained damage during Iranian strikes.
- Emirates has advised that services will resume only when conditions permit safe operations and that **further updates will be issued**.

Qatar Airways (Doha)

- Qatar Airways has **suspended all flights to and from Doha** following the closure of Qatari airspace.
- The airline has stated that operations will resume only once the **Qatar Civil Aviation Authority confirms the safe reopening of airspace**.
- Qatar Airways has advised that a **further update will be provided**, noting that schedules may change at short notice.

Etihad Airways (Abu Dhabi)

- Etihad has cancelled all flights to and from Abu Dhabi, advising customers that the situation remains dynamic.
- The airline has confirmed that additional updates will be issued as conditions evolve.

Other international carriers

- Multiple global airlines have cancelled or rerouted services due to the loss of safe overflight corridors.
- Cathay Pacific has confirmed suspensions affecting both passenger services and freighter operations at Dubai's Al Maktoum airport, directly reducing global air cargo capacity.

Air Cargo Implications

The Gulf is a major global air cargo interchange, and the shutdown of Dubai, Doha and Abu Dhabi has significantly reduced available uplift.

- Airlines are facing longer routings, higher fuel burn and increased operating costs, placing upward pressure on air freight rates.
- Even after airspace reopens, network recovery is expected to be staged, due to aircraft and crew dislocation.

SEA FREIGHT – CONTAINERISED SHIPPING DISRUPTION

The conflict has escalated security risks to maritime traffic across key Middle East chokepoints, particularly the **Strait of Hormuz** and **Red Sea**.

Major container shipping lines have implemented **emergency security and operational measures**.

Carrier updates

MSC Mediterranean Shipping Company (MSC)

- MSC has instructed all vessels currently operating in the Gulf region, as well as those en route, to proceed to designated safe shelter areas.
- MSC has temporarily suspended all bookings for worldwide cargo to the Middle East region until further notice.
- MSC has advised customers that further details will be provided as the situation evolves, including any potential alternative discharge ports.

CMA CGM

- CMA CGM has instructed all vessels inside the Gulf, and those bound for the Gulf, to proceed immediately to shelter.
- Passage through the Suez Canal has been suspended, with vessels rerouted via the Cape of Good Hope.

Hapag Lloyd

- Hapag Lloyd has officially suspended all vessel transits through the Strait of Hormuz.
- The carrier has warned shippers to expect delays, reroutings and schedule adjustments.

Maersk

- Maersk has advised that services including MECL and ME11 are now being redirected around Africa, rather than transiting the Suez Canal.

Operational observations

- Data indicates multiple container vessels have made U turns or halted progress rather than transiting the Strait of Hormuz.
- While a small number of vessels continue to transit, most major container vessels have ceased Hormuz transits.
- Market intelligence suggests Gulf bound cargo may increasingly be discharged at alternative regional ports such as Salalah, Khor Fakkan, Sohar, Duqm and Colombo for onward movement by smaller vessels.

IMPACTS ON GLOBAL SUPPLY CHAINS

- ❖ **Air freight:** Reduced global capacity and network disruption are expected to affect air cargo, particularly for time critical and high value goods.
- ❖ **Sea freight:** Extended routings, port congestion and equipment imbalances may affect transit times and schedule reliability
- ❖ **Costs:** Rising fuel prices, war risk surcharges and emergency conflict surcharges are expected to place upward pressure on freight rates, even for cargo not directly moving to the Middle East.

Source: The Freight & Trade Alliance (FTA) and the Australian Peak Shippers Association (APSA)

Further updates will be available on www.antrak.com.au