

XENETA

Market Intelligence & Advisory

CUSTOMER EDITION

Not all gateways are equal

A Xeneta special report on performance and connectivity across alternative Persian Gulf gateways.

20 August 2026

www.xeneta.com

Jeddah

Mersin

Aqaba

Khor Fakkan

Sohar

INTRODUCTION

Gulf-bound capacity has settled into a new pattern rather than recovered.

Spot rates are spread wide across alternative Persian Gulf gateways, but performance reveals a sharper divergence. Red Sea diversions and disruption around the Strait of Hormuz have pushed Gulf-bound cargo through a narrow set of gateway ports.

This report covers five of the container gateways absorbing that traffic. Each anchors a distinct routing corridor: the Red Sea (Jeddah, Aqaba), the East Mediterranean alternative (Mersin), and the Gulf of Oman (Khor Fakkan, Sohar).

It is built for gateway selection and contracting: which ports to route through, which to buffer, and which to plan an alternative for. Each port profile closes with a routing verdict; the implications section turns those verdicts into procurement actions for the next tender round.

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What we measure

- **Connectivity** : Unique port connections per port, by region
- **Capacity** : Delivered capacity versus proforma capacity, share per carrier and per port
- **Schedule reliability** : Arrival delay against proforma and congestion
- **Cancellations** : Blanked, skipped and omitted calls

Reliability and cancellation metrics are compared across four phases

Pre-war Dec 25 – Feb 26	Shock Mar – May 26	Routinization Jun – Jul 26	Forecast Aug 26 Forecast
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How to read this report:

Every gateway is compared on the same metrics across all four phases, each port profile closes with a routing verdict, and those verdicts drive the procurement actions.

1. See Appendix 2 for the difference between reason-identified loss and net loss

EXECUTIVE SUMMARY

Planned capacity has been redistributed across the five gateways: Khor Fakkan (+158%) and Sohar (+53%) gained, Aqaba (–20%) contracted, and Jeddah and Mersin held flat. Delivered capacity still trails behind, with carrier cancellations at 26% of total scheduled TEU and berth arrival delays pushing past 8 days into August 2026.

July spot rates ex-China fall in a wide \$5.2k-8.2k per FEU band, but price does not rank these gateways with the same clarity performance does¹. Routing now turns on operational stability, carrier optionality and connectivity.

PORT-BY-PORT SUMMARY

Jeddah

76% delivered; 12% on-time

The largest and most connected gateway with 83 destination ports across Europe, Asia, and Africa. Carriers delivered 76% of scheduled capacity, and cancellations are the only source of that shortfall in June–July. On-time arrivals reach just 12% with average delays at 9.5 days, the widest in the network. The capacity exists, but schedules don’t hold.

Route through Jeddah on large volumes but add schedule buffers of 10 days.

Mersin

89% delivered; 26% on-time

The only gateway where both capacity and reliability remain resilient. Carriers delivered 89% of scheduled capacity and ran 26% on-time from June–July, highest of the five. The caveat: Mersin sits in the Mediterranean corridor and requires the longest ocean transit for services not avoiding Bab-al-Mandeb.

Reliable but requires cross-border transit through both Türkiye and Iraq to reach the Persian Gulf.

Khor Fakkan

89% delivered; 7% on-time

An initial burst of ad-hoc volumes followed by a 158% rise in proforma capacity has created a delay-led loss in planned capacity. On-time performance remains the lowest of all at just 7%.

Suitable for flexible, non-time-sensitive cargo and transshipments.

Aqaba

60% delivered; 11% on-time

Weak carrier commitment at just 60% of scheduled capacity delivered. On-time arrivals collapsed to just 11%. Aqaba serves Jordan and northern Saudi Arabia as a secondary Red Sea entry and a relief valve for Jeddah merchant haulage.

It should not anchor a regional routing strategy.

Sohar

48% delivered; 12% on-time

Severe schedule disruption is driving capacity disengagement. Carriers delivered 48% of scheduled capacity with cancellations the leading cause. On-time performance fell 31 points from pre-war to 12% in June–July.

Seek alternative routing when possible.

ACTIONS FOR PROCUREMENT IN Q3 2026

1. Consider reliability over rate for routing planning

A \$100/FEU saving at a port running eight days late costs more in buffer stock and missed connections than the rate gap.

2. Match the fix to the cause

Where carriers cancel (Jeddah, Aqaba, Sohar) keep a second gateway ready and reroute early. Where vessels arrive late (Khor Fakkan) add transit time and consider transshipment.

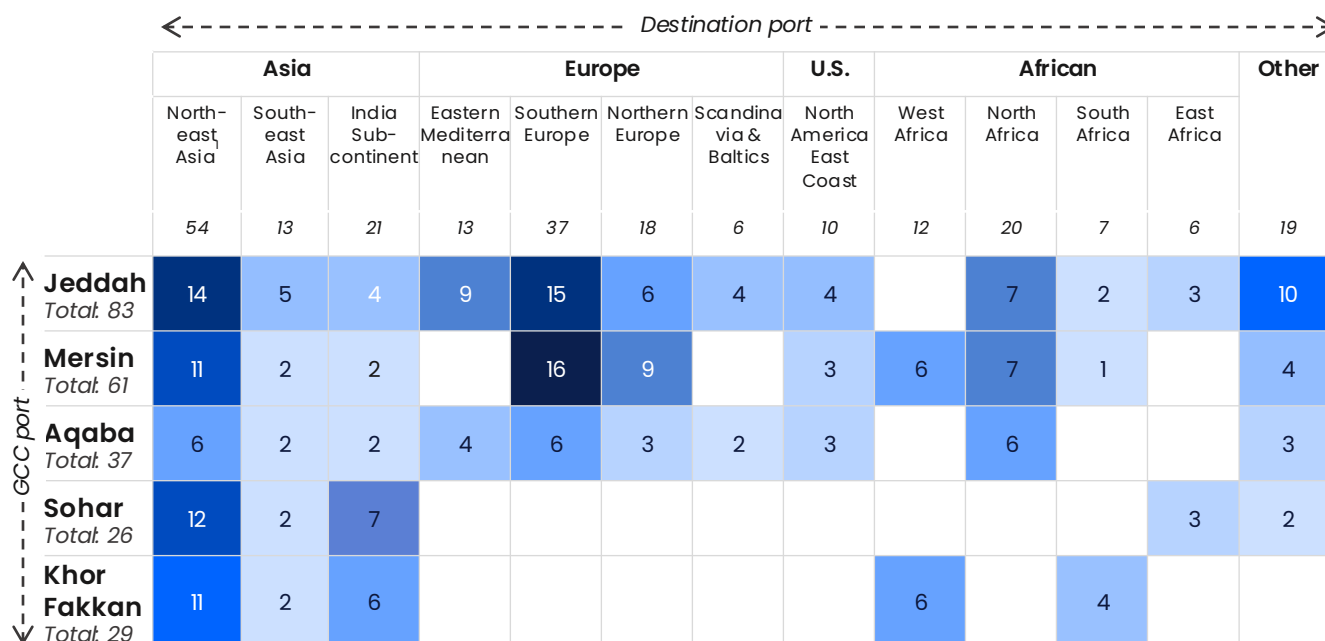
3. Allocate for resilience

Carriers with weak reliability but high market share still hold advantages; an extensive regional network reroutes rolled cargo fastest.

1. Source: Xeneta platform data as of 31 July 2026, short-term contracts 40DC
2. Delivered ratio (%) for each port is a net value and includes ad-hoc calls. This is not a 1:1 with attributed capacity loss in p6

Network reach across the five Persian Gulf gateways is split on Europe reach, while smaller ports serve specialized trade lanes.

Figure: Persian Gulf Gateway Port connections¹



The five gateways reveal a critical divergence in global port connectivity. The Red Sea and Mediterranean gateways (Jeddah, Mersin, Aqaba) connect to 45 unique European destinations combined; Gulf of Oman ports (Khor Fakkan, Sohar) connect to none. Yet all five share direct connections into Northeast Asia, Southeast Asia, and the Indian Subcontinent.

The Red Sea and Mediterranean gateways

- Jeddah's 83 unique connections make it the largest gateway and the only gateway with simultaneous reach across Asia, Europe, North America, and Africa – a resilience asset that also makes it vulnerable to overflow when Suez-adjacent routing shifts.
- Mersin functions more as a dedicated Europe hub: 25 out of 61 connections point to Europe, offering greater optionality to Northern Europe than Jeddah.
- Aqaba's 37 connections carry no dominant regional concentration, its unique value is as a Red Sea bypass for Jordan-origin cargo or alternative to Jeddah for merchant haulage.

For shippers moving China-origin cargo into the Middle East or Gulf of Oman, ample routing optionality exists. The question is which port's connectivity profile best matches the cargo destination.

Gulf of Oman gateways

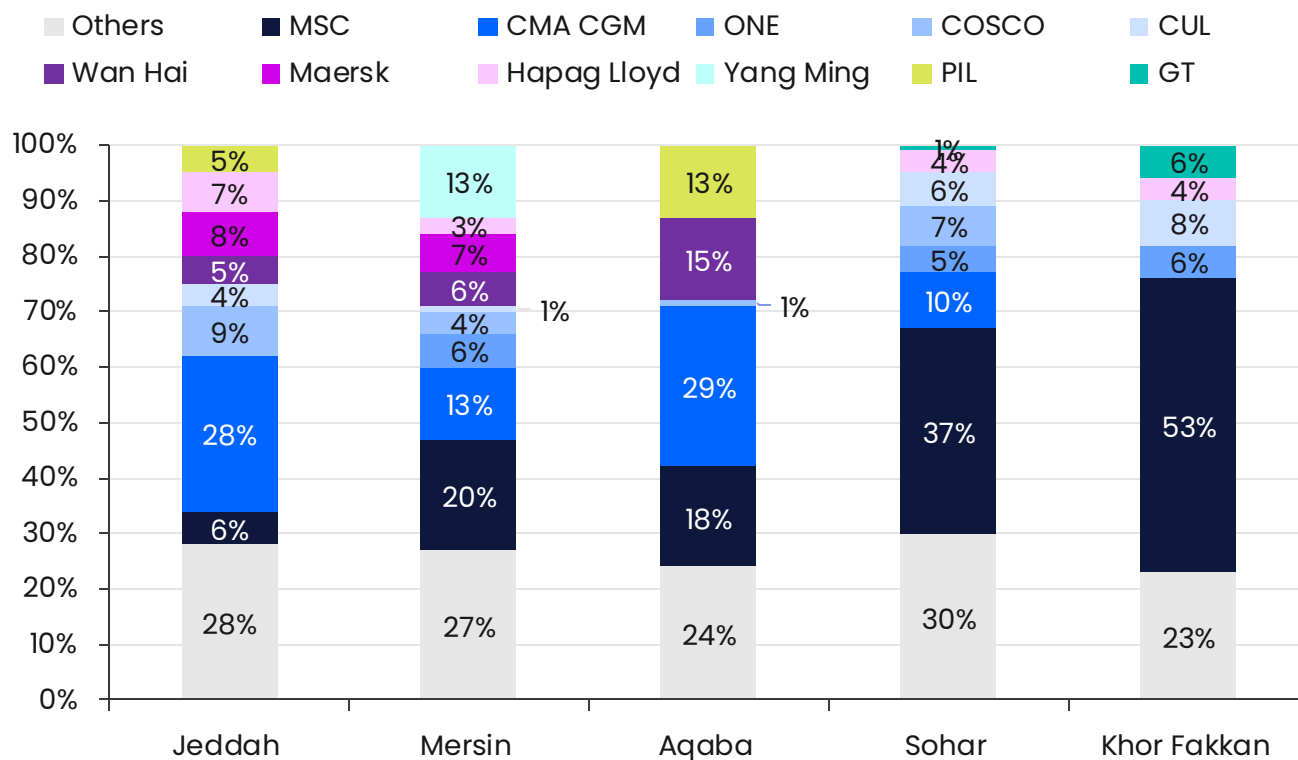
Khor Fakkan and Sohar share a coastline but have distinctly different strengths. While Khor Fakkan skews toward West and Southern Africa (10 of 29 destinations), Sohar is more localized in the Indian Subcontinent, Gulf of Oman, and Red Sea (12 of 26). Despite their smaller size, both gateways compete closely with Mersin and Jeddah on connections to Asia.

1. Source: Xeneta; Cross-region connections only; Northeast Asia includes China. Data is as of 31 July 2026

Two carriers are reshaping the gateway map: CMA CGM holds the Red Sea corridor and MSC is dominating the Gulf of Oman.

Figure: Carriers capacity share at Persian Gulf gateway ports, 31 July 2026¹

Unit: Percentage



CMA CGM anchors the Red Sea corridor, while MSC dominates in Gulf of Oman and Mersin. Maersk and Hapag-Lloyd stay marginal, and roughly a quarter to a third of capacity at every port sits with smaller VSA partners.

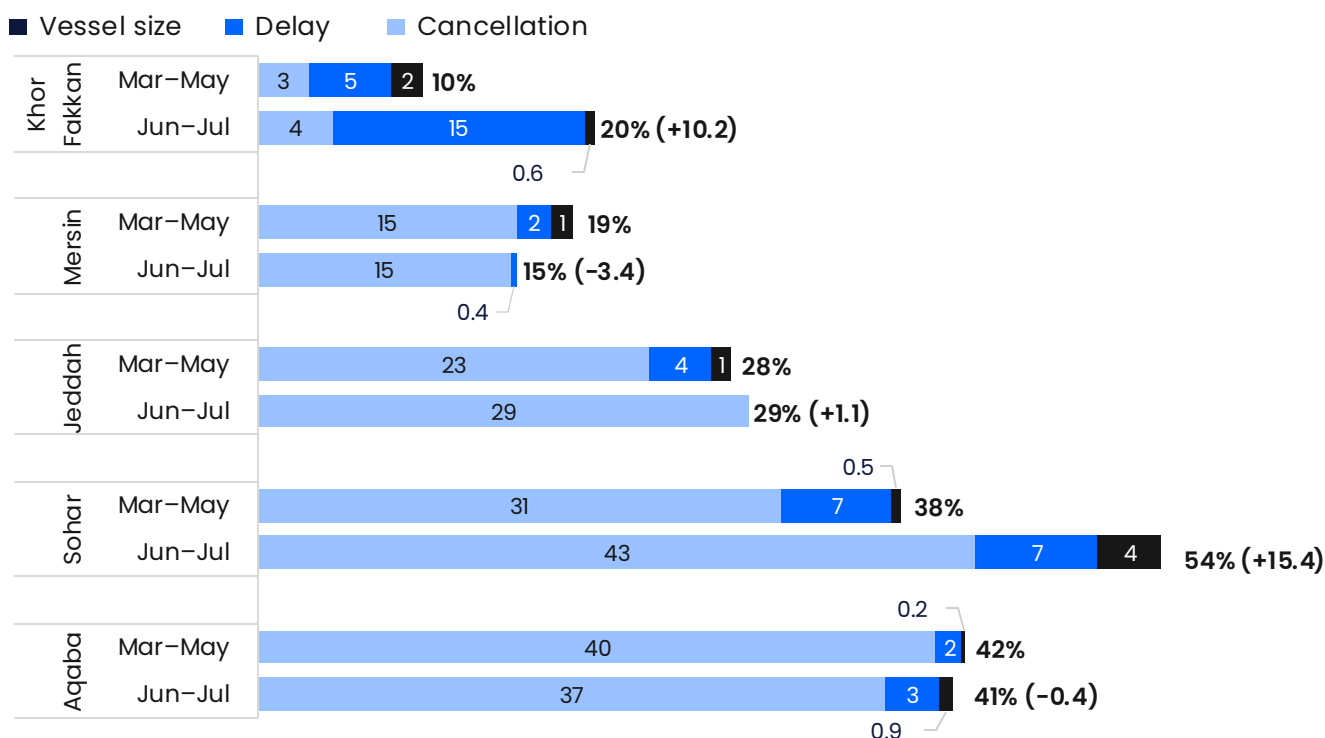
- Jeddah is led by CMA CGM (28%), followed by a balanced spread across COSCO (9%), Maersk (8%), Hapag-Lloyd (7%), MSC (6%), PIL (5%), Wan Hai (5%), and CUL (4%). These eight cover 72%; 30 smaller carriers hold the remaining 28%.
- Mersin has the lowest single carrier concentration of the five ports; MSC leads with 20%, followed by Yang Ming (13%), CMA CGM (13%), Maersk (7%), Wan Hai (6%), and ONE (6%).
- Aqaba is led by CMA CGM (29%) and MSC (18%), with Wan Hai (15%) and PIL (13%) close behind. Maersk, Hapag-Lloyd, and ONE do not call this Jordan gateway.
- Khor Fakkan has the highest single carrier share of the five with MSC holding 53%, driven by the new Shikra string rotation and the phasing out of ONE's Intra-Asia West (IAW) service in August 2026. Regional operators GT Lines (6%) and CUL (8%) play a key role in transshipments.
- Sohar is led by MSC (37%), followed by CMA CGM (10%), COSCO (7%), CUL (6%), and ONE (5%). These five covered 65% capacity; 14 smaller carriers hold the rest.

1. VSA-weighted share of pro forma capacity during the disruption period. Source: Xeneta, eeSea VSA slot allocations. Analysis as of 31 July 2026.

2. PIL (Pacific International Lines); CUL (China United Lines); GT Lines (Gulfair Lines)

Aggregate loss held flat, but cancellation became the leading failure mode

Figure: Total capacity lost as % of proforma TEU, by reason; Mar–May vs Jun–Jul 2026¹



The total attributed capacity loss saw a slight growth from 28% to 29%, but the composition changed: cancellations rose from 23% to 26% of network proforma TEU while delay held flat at 3%.

- **Khor Fakkan** marks the second-most extreme deterioration behind Sohar, and it is entirely delay-driven. Capacity loss doubled from 10% to 20% as the UAE gateway's new services accrued delay in Jun–Jul.
- **Mersin** alone genuinely improved, but it was also less vulnerable to crisis-driven schedule disruption. A 3.4 decline in attributed capacity loss signal relatively low cancellations for Türkiye's largest container port.
- **Jeddah** stayed flat in attributed capacity loss (+1pp) at 29% in routinization but is now characterized by carrier-driven cancellations. One in two cancellations are carriers skipping the port specifically, as opposed to a cancelled voyage.
- **Sohar** cancellations cut back 43% of planned capacity in Jun–Jul while delays lingered in scope but increased in severity. Carriers are curbing schedules around berth delays and taking capacity with them.
- **Aqaba** remains entrenched at 41% capacity loss in Jun–Jul. With 37% attributed to cancellations, capacity-commitment failure from carriers remains elevated.

Implication

Approach by failure mode, not by loss size. Jeddah and Aqaba prompt capacity commitment review; Khor Fakkan requires de-prioritization of short arrival windows; and Sohar suggests rerouting as severe delays continue to disengage capacity.

1. See Appendix 2 for the difference between attributed loss and net loss
 2. Network figures are totals, not averages: TEU lost divided by TEU planned across all five gateways.

CRISIS PERIOD AND SHORT-TERM OUTLOOK

Key Metrics	Pre-war Dec 25–Feb 26	Shock Mar 26–May 26	Routinization Jun 26–Jul 26	Forecast Aug 26
On-time performance (%)	29%	19%	12%	16%
Average arrival delay (days)	+3.4d	+6.4d	+9.5d	+6.8d
Blank+skip (%scheduled calls)	19%	28%	23%	23%
Omission (%scheduled calls)	4%	13%	24%	4%

KEY INSIGHTS

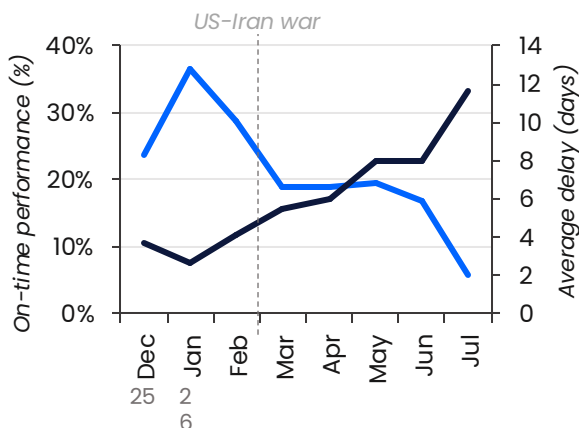
A steady and ongoing decline. On-time performance fell from 29% pre-war to 19% in the shock and 12% in routinization, with average delay deepening at each stage to +9.5 days. Blank sailings spiked in the shock (28% of planned calls), while omissions took over in routinization, climbing to 24%. Vessels increasingly sail past Jeddah, signaling port-specific disruption alongside advance capacity withdrawal. Congestion remains elevated in the 50–64% band since May, more vessels are queuing but clear relatively fast.

August offers some recovery but omissions will likely inflate down to the wire. Shippers should plan for significant schedule variance, examine string specific cancellation trends, and build contract buffers accordingly.

OPERATIONAL TREND

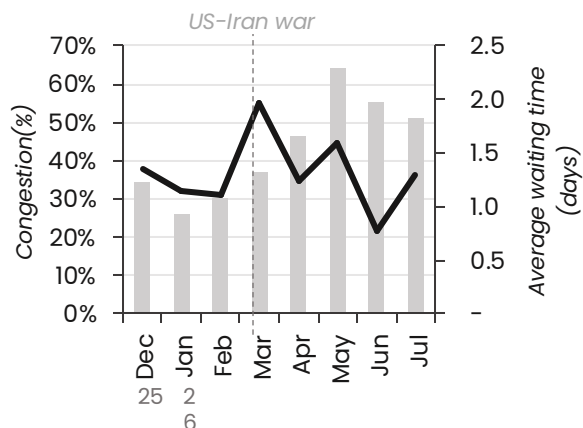
Schedule reliability and Delay

— On-time performance (%) – Left axis
— Average delay (days) – Right axis



Congestion and Waiting time

— Congestion (%) – Left axis
— Average waiting time (days) – Right axis



CARRIER & SERVICE OVERVIEW¹

Carrier Ranking	Top	Flagged
	Maersk	PIL
OTP	27%	0%
Cancellation	0%	58%
Capacity share	8%	5%

Mainline Service Ranking	Top	Flagged
	CMA - OCR	WHL - FM1
OTP	40%	0%
Cancellation	29%	53%
Delay	+2.3d	+15.1d

02 Mersin

The most reliable gateway with the least proximity

CRISIS PERIOD AND SHORT-TERM OUTLOOK

Key Metrics	Pre-war Dec 25–Feb 26	Shock Mar 26–May 26	Routinization Jun 26–Jul 26	Forecast Aug 26
On-time performance (%)	23%	14%	26%	18%
Average arrival delay (days)	+3.5d	+5.4d	+5.0d	+5.3d
Blank+skip (%scheduled calls)	16%	16%	13%	5%
Omission (%scheduled calls)	6%	13%	9%	1%

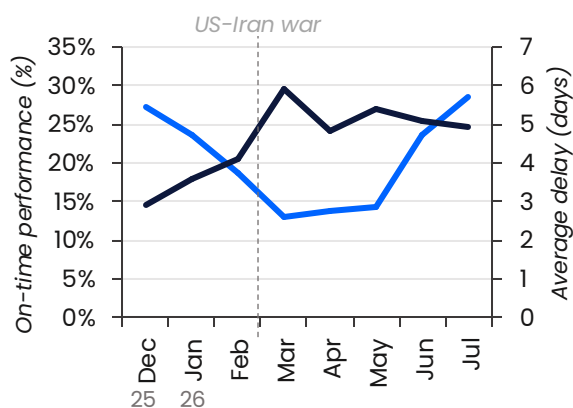
KEY INSIGHTS

Mersin is the only gateway that shows recovery signals across multiple measures, but August may pose a new pressure test with congestion ratios and vessel wait times rising. On-time performance dipped to 14% in the shock but rebounded to 26% in routinization; the highest among other gateways during this period. Delay is contained at ~5.0 days and both blank sailings and omissions are low relative to peers. Vessel wait times rose sharply from 1.0 days in June to 2.2 in July, with knock on delays to be expected to trickle down: forecasted August reliability dips to 18% and cancellations are likely to increase modestly as time to arrival nears. Remains a strong European access corridor, and an alternative to Persian Gulf-bound merchant haulage via Jeddah or Aqaba.

OPERATIONAL TREND

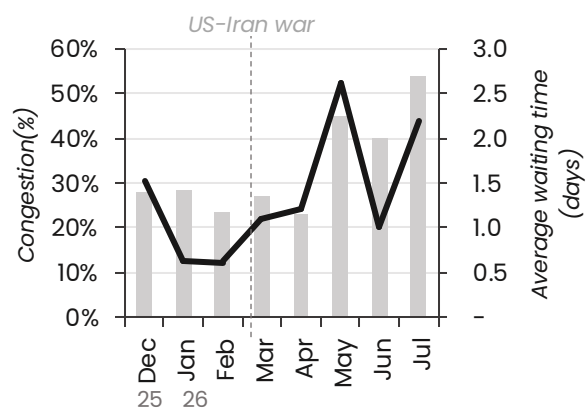
Schedule reliability and Delay

— On-time performance (%) – Left axis
— Average delay (days) – Right axis



Congestion and Waiting time

■ Congestion (%) – Left axis
— Average waiting time (days) – Right axis



CARRIER & SERVICE OVERVIEW¹

Carrier Ranking	Top	Flagged
	Maersk	Yang Ming
OTP	61%	0%
Cancellation	8%	11%
Capacity share	7%	13%

Mainline Service Ranking	Top	Flagged
	PMR – MD3	OCEAN – MED5
OTP	89%	0%
Cancellation	0%	50%
Delay	+0.5d	+5.0d

03 Khor Fakkan

Feeder-driven reach with high mainline risk

CRISIS PERIOD AND SHORT-TERM OUTLOOK

Key Metrics	Pre-war Dec 25–Feb 26	Shock Mar 26–May 26	Routinization Jun 26–Jul 26	Forecast Aug 26
On-time performance (%)	0.0%	27%	7%	13.3%
Average arrival delay (days)	+7.3d	+3.2d	+6.7d	+8.1d
Blank+skip (%scheduled calls)	29%	44%	28%	17%
Omission (%scheduled calls)	32%	15%	20%	3%

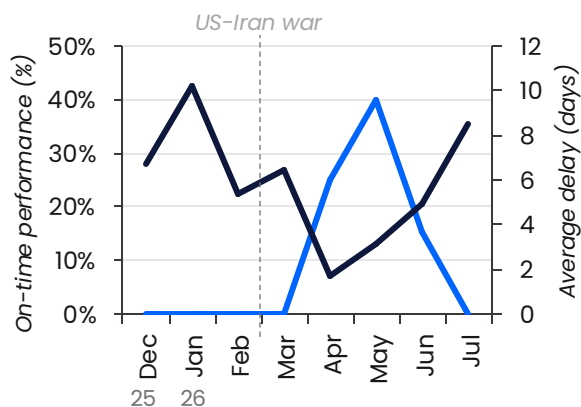
KEY INSIGHTS

Feeder driven reach masks exceptionally weak mainline execution here. Reliability is volatile across all stages – a shock reading of 27% (propped by port swaps) falls to 7% in routinization. Cancellations are the highest in the network, peaking at 59% of planned calls and remains elevated with 28% of calls blanked and 20% omitted. Congestion rebounds in July with 1.9 days of wait time and August forecasts reflect 8.1 days of delay building on that chokepoint. The pre-war baseline is based on a now suspended legacy service. Khor Fakkan is suitable for flexible, non-time-sensitive cargo and transshipment only; avoid committing tight delivery windows.

OPERATIONAL TREND

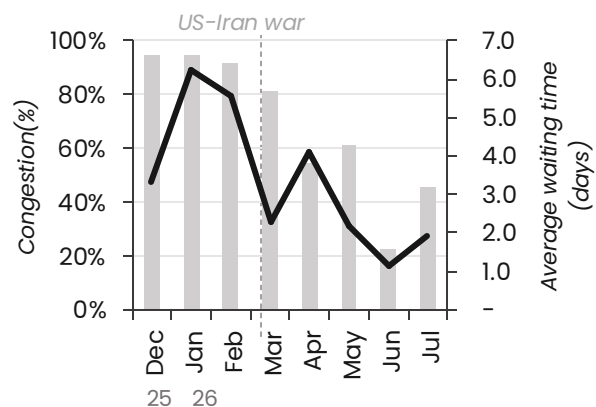
Schedule reliability and Delay

— On-time performance (%) – Left axis
— Average delay (days) – Right axis



Congestion and Waiting time

■ Congestion (%) – Left axis
— Average waiting time (days) – Right axis



CARRIER & SERVICE OVERVIEW¹

Carrier Ranking	Top SSL	Flagged MSC
OTP	25%	0%
Cancellation	38%	73%
Capacity share	4%	53%

Mainline Service Ranking	Top ONE – IAW	Flagged MSC – SHIKRA
OTP	25%	0%
Cancellation	50%	43%
Delay	+4.6d	+17.9d

1. Note scarcity of deep-sea services at this port. The 'best' performing service – ONE's IAW – is being suspended in August and the runner up is GT Line's India Express 1 that serves Mundra and Nhava Sheva exclusively.

04 Aqaba

A delayed breakdown, high likelihood of cancellations

CRISIS PERIOD AND SHORT-TERM OUTLOOK

Key Metrics	Pre-war Dec 25–Feb 26	Shock Mar 26–May 26	Routinization Jun 26–Jul 26	Forecast Aug 26
On-time performance (%)	32%	32%	11%	19%
Average arrival delay (days)	+3.4d	+4.2d	+9.2d	+5.1d
Blank+skip (%scheduled calls)	20%	27%	29%	32%
Omission (%scheduled calls)	12%	22%	30%	4%

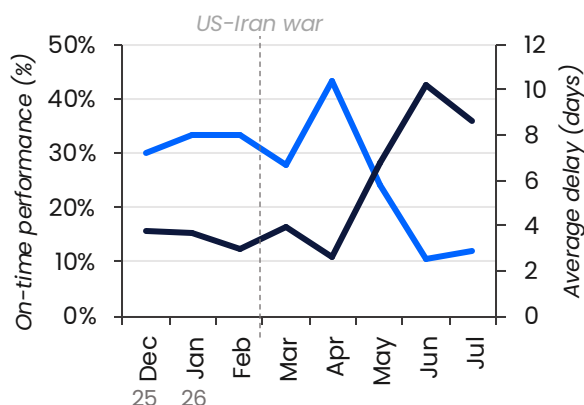
KEY INSIGHTS

Aqaba sat out the initial shock, then broke late. On-time held at 32% (pre-war level) before collapsing to 11%, with average delay more than doubling to 9.2 days. The mechanism is omissions – 30% of planned calls, more than Jeddah or Khor Fakkan. The disruption is recent, driven by Aqaba's emerging role as a pressure valve for Jeddah merchant haulage. As a local feeder hub and Red Sea entry point for Jordan and northern Saudi Arabia, it suits specialised solutions but should not anchor a regional routing strategy. Watch for last-minute omissions and build in delay buffers of 10 days.

OPERATIONAL TREND

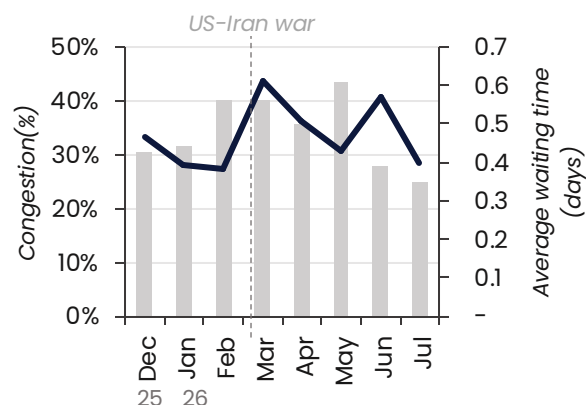
Schedule reliability and Delay

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Congestion and Waiting time

■ Congestion (%) – Left axis
— Average waiting time (days) – Right axis



CARRIER & SERVICE OVERVIEW¹

Carrier Ranking	Top	Flagged
	Arkas	MSC
OTP	33%	0%
Cancellation	56%	89%
Capacity share	9%	18%

Mainline Service Ranking	Top	Flagged
	CMA - REX2	PIL- RS2
OTP	25%	0%
Cancellation	29%	33%
Delay	+5.6d	+5.1d

1. The Top mainline service is 'best' by default as every string to this port is currently experiencing high cancellations or severe delays and 0% on-time percentage across 7 out of 10 strings.

05 Sohar

The fastest, deepest collapse with a two-wave disruption

CRISIS PERIOD AND SHORT-TERM OUTLOOK

Key Metrics	Pre-war Dec 25–Feb 26	Shock Mar 26–May 26	Routinization Jun 26–Jul 26	Forecast Aug 26
On-time performance (%)	43%	0%	12%	9%
Average arrival delay (days)	+3.0d	+3.6d	+7.9d	+7.3d
Blank+skip (%scheduled calls)	16%	33%	23%	17%
Omission (%scheduled calls)	6%	39%	37%	2%

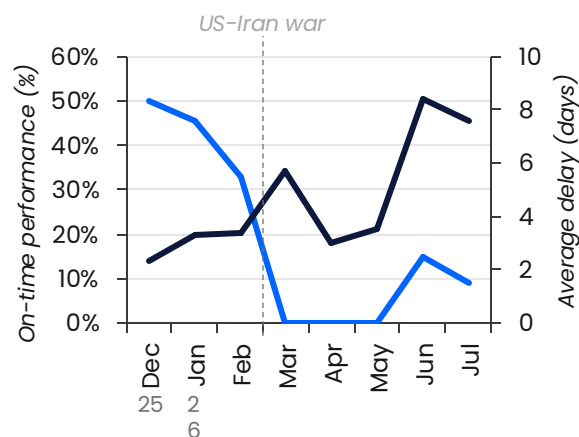
KEY INSIGHTS

On-time arrivals briefly disappeared from 43% pre-war to 0% in the shock before a slight recovery to 12% in June–July. Cancellations dominated the shock and omissions remain elevated (37%) while deep delays in routinization (7.9 days) add pressure. Sohar has the highest sustained congestion ratio (55–75%) from April onward, with queues building on already high pre-war levels. Monthly average vessel wait times peaked to 16.2 days in May before falling to 2 days in July. A supplementary gateway where extreme schedule disruption is a direct contributor to capacity loss; seek alternative routing when possible.

OPERATIONAL TREND

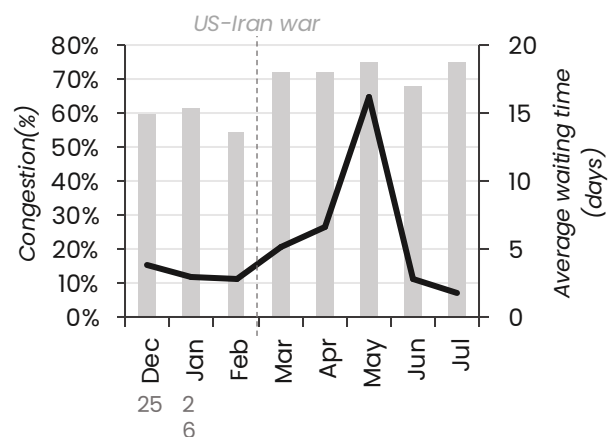
Schedule reliability and Delay

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— Average delay (days) – Right axis



Congestion and Waiting time

— Congestion (%) – Left axis
— Average waiting time (days) – Right axis



CARRIER & SERVICE OVERVIEW¹

Carrier Ranking	Top	Flagged
	CMA CGM	MSC
OTP	30%	0%
Cancellation	38%	46%
Capacity share	10%	37%

Service Ranking	Top	Flagged
	OCEAN – MEA1	MSC – SHIKRA
OTP	29%	0%
Cancellation	22%	29%
Delay	+5.7d	+17d

Watchpoints and triggers in Quarter 3 2026

WHAT CHANGED

Some carriers (eg Hapag-Lloyd) have stopped accepting cross-border merchant haulage bookings into Jeddah, reserving space for Saudi-bound cargo per Mawani guidance.

Shippers on merchant haulage need to switch to carrier haulage or secure another gateway.

ONE and CMA CGM announced EFS updates taking effect in August, following the dissolution of the short-lived MOU between the United States and Iran on 8 July.

Expect bunker adjustment factor revisions on the next quarterly cycle to take hold on October 1. Stay alert for stacked-on fuel charges.

New strings phase in during August and September while others like the MSC Europe-Red Sea-Middle East Express phase out.

VSA capacity shares are in a period of high flux and are integral to smart allocations

WHAT WE ARE WATCHING

The Houthi embargo targets Saudi oil, not container traffic.

Perceived risk moved rates during earlier lulls without container vessels being targeted.

The US and Iran have stopped exchanging fire.

The previous ceasefire held ~23 of its intended 60 days. Treat the current unofficial pause as reversible with a long 2-4 month road to recovery if a deal is reached.

MSC is conducting an increasing number of ad-hoc Red Sea transits via Bab-al-Mandeb, including Asia – Europe Premier Alliance services Tiger and Jade.

Successful transits can prompt formal rotation and transit time restructuring into Mediterranean and Red Sea gateways.

Gemini partners Hapag-Lloyd and Maersk have formally committed their Asia Mediterranean loop 3 and loop 4 services to Bab-al-Mandeb transits.

The formal commitment from the risk-averse carriers may prompt other Alliances to follow suit in the weeks ahead.

Methodology and Definitions

Mainline coverage and carrier/service rankings

Service level rankings in this report focus on mainline strings defined by categories A, B, and C. eeSea by Xeneta defines liner network and capacity trade-lane categories as follows:

- A (Far East/Europe/North America primary)
- B (Far East/Europe/North America to Middle East secondary)
- C (Africa, Oceania, South America East Coast, South America West Coast)
- D (Intra-regional)
- E (Feeder)

On-time percentage (OTP%) and On-time performance (OTP)

- On-time performance (OTP) is a broader reliability concept. It encompasses on-time percentage alongside additional metrics such as average delay.
- On-time percentage (OTP%) measures the share of vessel arrivals that reach the destination on-time. This metric is also referred to as "On-time arrival". OTP% is the primary ranking metric for trades, alliances, and carriers in this report. Where two services rank equally on OTP%, average delay serves as the tiebreaker – measuring how severe late arrivals are relative to the proforma berth arrival date and time.
- A vessel call is on-time if it arrives within ± 24 hours of its proforma berth arrival date/time (absolute delay ≤ 1 day). Arrivals more than 24 hours early count as misses.

Arrival Delays

- Average delays measures how severe the delay is for vessels arriving on a given string or into a particular port.
- The metric is calculated on the same ± 24 hour of proforma berth arrival date/time as on-time arrivals.
- A positive (+) connotes additional days of transit to arrival against the original proforma arrival.

Capacity

- Capacity is measured on a nominal vessel capacity basis.
- Proforma capacity reflects capacity committed under proforma schedules.
- Blanked percentage (%) represents the share of proforma capacity that was lost to voyages blanked by carriers.
- Actual capacity adjusts for the following reasons: (1) reductions in deployed vessel size; (2) cancellations, comprising blank sailings, skipped sailings, and omissions (individual port calls bypassed while the vessel continues its route); and (3) delays that displace arrivals from one reporting period to the next.

Congestion ratio and vessel wait times

- The congestion ratio is defined as the proportion of vessels waiting relative to total vessels present (vessels waiting plus vessels in port).
- Xeneta uses a proprietary logic to include vessels waiting outside of anchorage geofence areas, ensuring wait time data reflects the full population of delayed vessels. This ensures wait time data covers the full population of delayed vessels (including those invisible to geofence-only methods) and produces a more accurate measure of port congestion.

Report-specific note

Data Disclaimer

This analysis covers the period through 31 July 2026.

On-time performance (OTP) and delay figures are subject to revision for the most recent reporting month due to rolling data ingestion. Trailing vessel arrivals recorded after the extraction date may modestly affect published figures.

Each metric is compared like-for-like across four phases, indexed to the pre-war baseline unless stated otherwise.

- **Pre-war** (Dec 25 – Feb 26): stable baseline before hostilities; all changes indexed here.
- **Shock** (Mar 26 – May 26): acute disruption; sharpest swings in omissions and reliability.
- **Routinization** (Jun 26 – Jul 26): post-shock pattern; shows which losses turned structural.
- **Forecast** (Aug 26): proprietary forecasts – projected reliability and capacity trends, not proforma schedules.

Scope of the port

Five Persian Gulf gateway ports in this report are Jeddah, Sohar, Mersin, Khor Fakkan, and Aqaba as the primary container gateways absorbing direct traffic rerouted by the Red Sea and Strait of Hormuz disruption. Each anchors a distinct routing corridor: the Red Sea (Jeddah, Aqaba), the East Mediterranean alternative (Mersin), and the Gulf of Oman (Khor Fakkan, Sohar).

- *Salalah excluded*: Salalah is Oman's largest container port, however, it is an Arabian Sea transshipment relay rather than a demand gateway like Sohar.
- *Fujairah excluded*: Fujairah is predominantly a liquid-bulk and bunkering hub, not a container gateway alongside Khor Fakkan.

Other terms

Carriers included under 'Others' in the VSA breakdown in page 5 include but are not limited to: Evergreen, Orient Overseas, HMM, ZIM, Arkas, Turkon, Regional Container Lines, Emirates Shipping Line, Grimaldi, Milaha, Tarros, United Africa Feeder Lines, T.S. Lines, and Folk Maritime.

Net capacity loss is not an exact correlation to the reason-specific (attributed) loss stated in page 6. These two figures answer different questions and will not add up to 100%. Net capacity loss compares what arrived against what was scheduled and includes gains from ad-hoc calls. Attributed loss adds up what cancellations, delays and smaller vessels each cost in TEU, month by month, without letting a strong month or unplanned arrivals offset what is lost so it tends to read higher.

TBN (to-be-named vessel) rates are elevated in the Middle East crisis window at Khor Fakkan and Sohar, reflecting unconfirmed vessel assignments rather than data loss. This is due to limited public information published by select regional and feeder operators. These unverified calls are excluded from attributed capacity loss as their arrival can neither be confirmed nor ruled out. This also means we exercise an extra degree of caution when evaluating reliability on strings belonging to these carriers.

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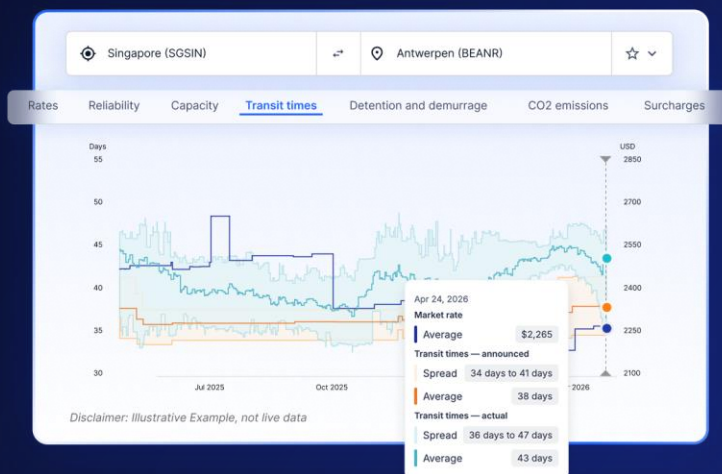


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